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DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

DRUG STORE CHAINS

IN

CANADA

1930

Published by Authority of the HON. H. H. STEVENS, M. P.,
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DOMINION BUREAU OF STATISTICS - CANADA

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS, 1931.

DRUG STORE CHAINS

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DRUG STORE CHAINS

Introduction

This report on drug store chains is one of a series presenting facts obtained in connection with the Census of Merchandising and Service Establishments, which formed part of the Seventh Decennial Census of Canada. Figures were received from all chain organizations operating in the retail drug field during 1930 and covering the trading operations of these chains during that year.

The 31 chains analyzed in this report operated 292 stores, which had total sales during 1930 of \$15,971,087. Of the total number, 8 chains with 103 stores indicated that they operated lunch counters, while 23 chains with 189 stores reported no lunch counter service. The 8 chains with lunch counters had total sales of \$5,858,431, of which lunch counter receipts, including soda fountain sales, amounted to \$326,660, or almost 16 per cent of the total sales of these chains.

There were 1,165 full-time male employees and 255 full-time female employees, who received a total salary of \$1,859,718. Part-timers received \$21,185. The total wage bill was, therefore, \$1,880,903, and other operating expenses, including rent, amounted to about the same figure, or \$1,888,927, thus making a total operating expense of 26.98 per cent of net sales. Of the total number of stores, 282 were operated in leased premises, for which rental costs averaged 6.19 per cent of sales in such premises.

Chains Defined

For this Census, a group of four stores or more under the same ownership and management and carrying on the same or similar kinds of business has been classified as a chain. Groups of two or three stores owned and operated by one proprietor or firm have been classified as two- or three-store multiples - not as chains - and are reported under these headings in the provincial general retail reports. So-called voluntary chains, in which the stores are individually owned and operated, but are grouped for buying and/or advertising purposes, are not considered as chains, but figures for these stores have been shown separately in the provincial retail reports. Chains have been classified as local, provincial, sectional and national, depending upon the extent of territory in which their branches are located. Local chains are located entirely, or almost so, within the same town or city. Provincial chains are located within one province. The units of sectional chains are spread over two or three provinces, while national chains have stores in four provinces or more.

Age and Geographic Distribution of Units

Of the 270 units of drug chains whose ages could be determined, 27, or 10 per cent, were opened in 1930, 87, or 30 per cent of the total, were opened in the four preceding years, and 162, or 60 per cent, were in operation prior to 1926.

When the 292 units of drug chains were classified according to geographic divisions, it is found that 137 were located in Ontario and 54 in Quebec. British Columbia came next with 41 units, followed by the Prairie Provinces with 37 and the Maritime Provinces with 23.

Geographic Distribution of Sales

In Table II, the total sales of all drug chains are analyzed by provinces, showing that approximately 50 per cent of all chain drug sales were made in Ontario. Quebec was next in importance with about 17 per cent of the total amount, followed by British Columbia with 14.6 per cent, the Prairie Provinces with 12.7 per cent, and the Maritimes with 5.7 per cent. In order to avoid disclosing the operations of individual concerns, it has been found necessary to combine the figures for the three Prairie Provinces and also for the Maritime Provinces. For the same reason, it is not possible to further analyze these sales showing the amounts by size of city.

Credit Sales

Ten of the 31 drug store chains reported that they sold on credit. Total net sales of these chains amounted to \$2,599,881, of which credit sales were \$299,638, or 11.52 per cent of the total. There were 13 chains with total sales of \$8,355,606 which reported that they sold only for cash, while the remaining 8 organizations did not indicate whether they sold for credit or not.

Operating Expenses

In addition to the amounts paid in salaries and wages and rental costs, each firm was asked to report other operating expenses. Other operating expenses include taxes, insurance, maintenance, delivery from stores, stationery and supplies, light, heat, power, interest on money borrowed for current business operations, and any other operating expense. The cost of goods purchased for re-sale was of course excluded, as well as any items on capital account. Chain store warehouses were considered as wholesale establishments for this Census and have been included in the wholesale reports. Expenses in connection with these warehouses are therefore excluded from this report.

Operating expenses are analyzed in Table IV. The chains are classified, first, according to type of operation, secondly, according to number of stores operated, then by total sales volume of the chain, and then by average sales per store. A table is also included showing operating expenses of chains operating lunch counters as compared with those not providing this service.

Of the 31 organizations analyzed in this bulletin, 24 were local chains, each operating entirely within one town or city. There were 5 chains each operating entirely within one province, although not confined to one city, and two chains had stores spread over two or more provinces. The 24 local chains operated 174 stores and had sales of \$6,696,634, or approximately 48 per cent of the total sales of all drug chains. Total operating expense for local chains amounted to 26.66 per cent of net sales, as compared with 27.28 per cent for provincial, sectional and national chains.

When classified according to number of units operated, it is seen that there were 6 chains which had more than 10 stores each, 10 chains had from 6 to 10 units each, and there were 15 chains each having less than 6 stores. The 6 chains, each having more than 10 units, operated 50 per cent of the total number of drug chain stores and accounted for approximately 60 per cent of the total drug chain sales. These 6 chains operated on a total expense ratio to sales of 26.27 per cent, as compared with 27.67 per cent for chains having from 6 to 10 units, and 28.52 per cent for chains with less than 6 units.

There were 5 chains each having a total sales volume of over \$500,000, and there were 4 chains each of whose total sales for the year amounted to less than \$100,000. The highest operating expense ratio, 29.10 per cent of net sales, was reported by chains whose total sales volume lay between \$100,000 and \$250,000 and the lowest, 26.17 per cent of net sales, was obtained by the 5 largest chains already mentioned.

When analyzed according to average sales per unit, it is found that the lowest total operating expense ratio was obtained by the 10 chains having average annual sales per store of over \$45,000 and the highest ratio was obtained by those chains whose average sales per store were less than \$30,000.

In Table IV(e), a distinction has been made as between chains operating stores with lunch counters and those which did not provide this service. The 8 chains selling meals operated 103 stores and had total sales in the year 1930 of \$5,858,431, of which the sale of meals amounted to \$926,660. These chains operated on an expense ratio to sales of 28.57 per cent, of which payroll amounted to 14.01 per cent, and other operating expenses, including rent, 14.56 per cent. Rent paid for leased premises amounted to 7.51 per cent of sales made in these premises. In comparison with these figures, chains providing no lunch counter service operated on an expense ratio of 25.84 per cent of net sales. This figure includes a payroll item of 13.07 per cent and other operating expenses of 12.77 per cent of net sales. Rental cost to sales amounted to 5.23 per cent, as compared with 7.51 per cent for chains operating lunch counters.

Middle Range Figures

The expense figures given in the preceding paragraphs and shown in Table IV were obtained by totalling the expense data given for each chain and expressing this total as a percentage of the total sales of the same companies. That is to say, these are weighted averages in which a large chain has more weight in determining the ratio for the group than a smaller organization. In Table V, average operating figures are given where each chain has been given the same weight irrespective of its size. Using this method, it is found that the average total operating expense for drug store chains was 27.89 per cent of net sales, as compared with 26.98 per cent as obtained by the other method. Upon referring to Table V, it will be seen that three values are given for total operating expenses under the headings: "Lower Limit of Middle Range", "Average of Middle Range", and "Upper Limit of Middle Range". The method of obtaining these three figures for total operating expense will be explained.

The total operating expense (including salaries, rent and other expenses) for each chain was expressed as a percentage of its total sales. These percentages were arranged in ascending order of magnitude. The array thus obtained was then divided into three ranges: the lower range, consisting of the first-quarter of the figures, and therefore including the lowest operating ratios; the upper range, consisting of the last-quarter of the figures and including the highest percentages; and the middle range, containing the remaining half of the figures. The average of the middle range was then found. Thus, after omitting the extremely high and low figures, due in most instances to exceptional circumstances, the remaining chains were given equal weight in obtaining an average operating expense ratio for the group. The "Lower Limit of the Middle Range" and "Upper Limit of the Middle Range" are, of course, the two values at either end of the middle group of figures.

Upon referring to Table V, it will be seen that the lower limit of the middle range for total operating expenses of drug store chains was 24.33 per cent, the upper limit was 31.54 per cent, and the average of the middle range was 27.89 per cent. Or, in other words, one-quarter of the drug chains had a total operating expense ratio of less than 24.33 per cent of sales, one-quarter of the chains had a total expense ratio of more than 31.54 per cent of sales, and one-half of the drug chains had an expense ratio lying between these two figures and centering around 27.89 per cent. The other items in this table were obtained in a manner similar to that used in the case of total operating expense. For example, the average figures for payroll cost of drug chains was 14.41 per cent of net sales. This figure was obtained by expressing the payroll cost of each chain as a percentage of its total sales, arranging these percentages in ascending order of magnitude, omitting the lower and upper quarters of the range and taking the average of the middle group. The boundary figures of the middle range in this case were 12.98 per cent and 16.42 per cent. That is to say, one-quarter of the chains had a payroll cost of less than 12.98 per cent of sales, one-quarter of the chains had a payroll cost of more than 16.42 per cent, and one-half the firms had a payroll cost ratio lying between these figures, and the average of these ratios was 14.41.

Each item in Table V was obtained by arranging the corresponding items for each chain in an array and following the procedure already outlined for total operating expense and payroll cost. In interpreting these middle range figures, then, each item must be considered independently as neither all the high nor all the low figures came from the same reports. That is to say, the items in any column in this middle range table cannot be related to other items in the same column. For instance, the upper limit of the middle range for average sales per store of drug store chains was \$45,858. The upper limit of the middle range for total operating expense was 31.54 per cent of net sales. Obviously, however, these two values cannot be related since the drug store chains with high average sales per store have the smallest operating expense. Nor is it probable that any one chain would have all its items equal to the average figures given in this table, but it is thought that, considering each item independently, these middle range figures give a fair indication of drug store chain operating results.

Commodities Sold by Drug Store Chains

A partial analysis of the sales made by drug chains is given in Table VI. Very few of the larger chains were able to break down their total sales in accordance with the outline provided in the Census schedules, but, whenever possible, a breakdown, even if incomplete, was secured. Due to the incompleteness of the data received for these drug chains, the percentages given for the various commodities should only be considered approximately correct. Sales of drugs and drug sundries are shown to be 47.42 per cent of the total drug chain sales, of which prescriptions amounted to 14.99 per cent. Toilet articles and preparations were next in importance, amounting to 29.55 per cent of the total, while receipts from the sale of meals, including ice cream and soda fountain sales, amounted to 9.57 per cent of all drug chain sales.

Table I

DRUG STORE CHAINS

Summary of Drug Store Chains

Number of chains	31
Number of stores	292
Net sales, 1930	\$ 13,971,087
Stocks on hand, end of year, at cost	\$ 2,510,904
Full-time employees --	
Male	1,165
Female	255
Salaries	\$ 1,859,718
Part-time employees --	
Male	22
Female	30
Salaries	\$ 21,185
Total payroll reported	\$ 1,880,903
All other expenses, including rent	\$ 1,888,927
Total operating expenses, per cent to net sales	26.98
Number of stores in leased premises	282
Rent paid for leased premises	\$ 841,455
Net sales of stores in leased premises	\$ 13,589,213
Per cent of rent to sales in leased premises	6.19
Number of chains reporting credit	10
Total net sales of such chains	\$ 2,599,881
Net credit sales of such chains	\$ 299,638
Ratio of credit sales to total sales of such chains	11.52
Number of chains reporting they sell only for cash	13
Total net sales of such chains	\$ 8,355,606

Table II

Stores and Sales Classified by Provinces

Province	Stores	Sales	Per cent of total drug chain sales
		\$	
Canada, total	292	13,971,087	100.00
British Columbia	41	2,042,476	14.62
Alberta	19)		
Saskatchewan	7)	1,778,479	12.73
Manitoba	11)		
Ontario	137	6,989,233	50.03
Quebec	54	2,367,885	16.95
New Brunswick	4)		
Nova Scotia	18)	793,014	5.67
Prince Edward Island	1)		

Table III(a)

DRUG STORE CHAINS

Chain Units Classified by Geographic Location and Date of Establishment

Geographic Division	Total units	Per cent of total units	Date of establishment of units					Before 1926	Units whose ages cannot be classified
			1930	1929	1928	1927	1926		
Canada, total	292	100.00	27	37	19	13	12	162	22
British Columbia	41	14.04	2	5	2	1	-	14	17
Alberta	19	6.51	1	5	3	-	1	9	-
Saskatchewan	7	2.40	1	2	-	1	-	3	-
Manitoba	11	3.77	-	2	1	-	1	7	-
Ontario	137	46.92	14	15	6	10	9	83	-
Quebec	54	18.50	5	4	4	1	1	34	5
New Brunswick	4	1.37	-	2	1	-	-	1	-
Nova Scotia	18	6.15	3	2	2	-	-	11	-
Prince Edward Island	1	.54	1	-	-	-	-	-	-

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Table III(b)

Chain Units Classified by Date of Establishment and Size of Chain

	Total units		Units in chains of -			
	Number	Per cent of total	More than			Less than 6 units
			10 units	6-10 units	80	
Total, All Units	292	-	147	-	-	65
Less units which cannot be classified as to age	22	-	22	-	-	-
Units classified as to age	270	100.00	125	80	80	65
All units establiished -						
1930	27	10.00	14	3	3	10
1929	37	13.71	15	14	14	8
1928	19	7.04	5	5	5	9
1927	13	4.81	7	3	3	3
1926	12	4.44	9	1	1	2
Before 1926	162	60.00	75	54	54	33

Table IV

DRUG STORE CHAINS

Drug Store Chain Operating Expenses

A. Chains Classified by Type of Operation.

	Number of chains	Number of units	Net sales (1930) \$	Per cent of units opened in 1930	Operating expenses					Rent paid in leased premises per \$100 of sales in such premises	
					Total \$	Per \$100 sales	Payroll \$	Per \$100 sales	Other expenses, including rent \$		Per \$100 sales
Total, All Chains	31	292	13,971,087	9.25	3,769,830	26.98	1,880,903	13.46	1,888,927	13.52	6.19
Local chains	24	174	6,696,634	8.62	1,785,264	26.66	953,956	14.25	831,308	12.41	6.08
Provincial chains ...	5	75)									
Sectional chains	1	6)	7,274,453	10.17	1,984,566	27.28	926,947	12.74	1,057,619	14.54	6.29
National chains	1	37)									

B. Chains Classified According to Number of Units Operated.

			\$		\$		\$		\$		
Total, All Chains	31	292	13,971,087	9.25	3,769,850	26.98	1,880,903	13.46	1,888,927	13.52	6.19
Chains having -											
More than 10 units ..	6	147	8,339,120	9.52	2,190,765	26.27	1,076,120	12.90	1,114,646	13.37	6.10
6 - 10 units	10	80	3,195,612	3.75	884,222	27.67	469,970	14.71	414,252	12.96	6.16
Less than 6 units ..	15	65	2,436,355	15.38	694,842	28.52	334,813	13.74	360,029	14.78	6.61

Table IV (Continued) -

DRUG STORE CHAINS

Drug Store Chain Operating Expenses

C. Chains Classified According to Total Sales Volume.

	Number of chains	Number of units	Net sales (1930) \$	Per cent of units opened in 1930	Operating expenses					Rent paid in leased premises per \$100 of sales in such premises	
					Total \$	Per \$100 sales	Payroll \$	Per \$100 sales	Other ex-penses, including rent. \$		
Total, All Chains	31	292	13,971,087	9.25	3,769,830	26.98	1,880,903	13.46	1,888,927	13.52	6.19
Chains whose total sales are -											
More than \$500,000 .	5	129	8,396,837	10.85	2,197,202	26.17	1,073,002	12.78	1,124,200	13.39	5.99
\$250,000 - \$500,000 .	8	62	2,759,625	6.45	760,889	27.56	379,018	13.73	381,671	13.83	6.60
\$100,000 - \$250,000 .	14	84	2,479,173	7.14	721,534	29.10	375,551	15.15	345,983	13.95	6.79
Less than \$100,000 .	4	17	335,452	17.65	90,405	26.95	53,332	15.90	37,073	11.05	3.89

D. Chains Classified according to Average Sales per Store.

			\$		\$		\$		\$		
Total, All Chains	31	292	13,971,087	9.25	3,769,830	26.98	1,880,903	13.46	1,888,927	13.52	6.19
Chairs whose average sales per store are-											
Over \$45,000	10	163	10,058,711	9.82	2,690,838	26.75	1,312,188	13.05	1,378,650	13.70	6.41
\$30,000 - \$45,000 ..	11	63	2,438,441	6.35	659,992	27.07	333,814	13.69	326,178	13.38	5.43
Less than \$30,000 ..	10	66	1,473,935	10.61	419,000	28.43	234,901	15.94	184,099	12.49	5.78

Table IV (Continued) -

DRUG STORE CHAINS

Drug Store Chain Operating Expenses

E. Chains Classified on Basis of Lunch Counter Service Provided.

	Number of chains	Number of units	Net sales (1930)	Per cent of units opened in 1930	Operating expenses					Rent paid in leased premises per \$100 of sales in such premises	
					Total \$	Per \$100 sales	Payroll \$	Per \$100 sales	Other expenses, including rent \$		
Total, All Chains	31	292	13,971,087	9.25	2,769,830	26.98	1,880,903	13.46	1,888,927	13.52	6.19
Chains with lunch counters	8	103	5,858,431	6.80	1,673,850	28.57	820,510	14.01	853,340	14.56	7.51
Chains without lunch counters	23	189	8,112,656	10.58	2,095,980	25.84	1,060,393	13.07	1,035,587	12.77	5.23

Table V (x)

Middle Range Figures

	Lower Limit of Middle Range		Average of Middle Range		Upper Limit of Middle Range	
	4		6		9	
Total number of stores	\$ 151,329		\$ 230,189		\$ 391,910	
Total sales volume of chain	\$ 27,760		\$ 37,782		\$ 45,858	
Average sales per store	0.00		9.10		18.18	
Per cent of total number of stores opened in 1930	12.98		14.41		16.42	
Payroll cost per \$100 sales	4.56		5.79		6.69	
Rental cost per \$100 sales in leased premises	5.55		7.12		9.05	
Other operating expense - not including salaries or rent	24.33		27.89		31.54	
Total operating expense per \$100 sales	\$ 1,028		\$ 1,200		\$ 1,443	
Average yearly salary per full-time employee	9.28		11.95		14.99	
Number of employees per \$100,000 sales						

(x) Since each item in this table was obtained independently, the figures in any one column cannot be related to each other. Nor can the individual expense items be added to obtain the total expense ratios shown. For explanations on the method of obtaining these figures, see introduction.

Table VI

DRUG STORE CHAINS

Sales by Commodities

Total Sales, All Chains	\$ 13,971,087
Less amount which cannot be broken down into commodities	4,781,200
Sales further analyzed	9,189,887
	<u>Per cent</u>
Commodity	100.00
Cameras and photographic supplies	1.52
Cigars, cigarettes and smokers' supplies	5.92
Drugs and drug sundries, total	47.42
Prescriptions	14.99
Drugs, pharmaceuticals, patent medicines, etc.	25.77
Rubber sundries, as sold in drug stores ...	2.90
Drug sundries	3.76
Food and kindred products, total	12.52
Receipts from sale of meals, soda fountain sales and ice cream	9.57
Candy, confectionery and nuts	2.73
Bottled beverages22
Stationery, books, magazines, etc.	1.76
Toilet articles and preparations	29.55
Photo finishing45
Miscellaneous merchandise and services86

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS, 1933.

Drug Store Chains in Canada, 1930 - 1933

This report is one of a series presenting preliminary figures for the Census of Merchandising and Service Establishments, 1933. The basic figures for the year 1930 were secured from the Census taken in 1931, and the data for the period 1931 to 1933 have been furnished for the Census just concluded.

These preliminary figures of the retail sales of drug chains relate only to chain store organizations and cannot be taken as a true indication of the business trend of all drug stores until the figures for independent stores have been prepared and compared with chain store sales. It is also necessary to point out that the entrance of new chain organizations into this field, through the expansion of single or multiple stores into chains and the disappearance of chain store organizations through ceasing to do business or retaining less than four units, affects the volume of trade handled by chains from year to year. In other words, the present report does not furnish a comparison of the business transacted by identical firms over the past four years, but it does indicate the yearly volumes of business transacted by firms which could be classified as chains.

A group of stores has been considered as a chain only when four or more stores are under the same ownership or management and carry on the same or similar kinds of business. In 1930, there were 31 drug chains in Canada which operated 292 stores and had total retail sales of \$13,971,300. In 1933, there were 29 chains operating in the drug field. The highest number of stores in operation during the year was 301, and retail sales amounted to \$11,001,700, or 78.7 per cent of the 1930 figure. Representing the retail sales of drug chains in 1930 by 100, the relative sales for the three following years may be represented by 97.2, 89.6 and 78.7.

When analyzed by geographic divisions, it is seen that the smallest decrease in drug chain sales occurred in Ontario, where the business in 1933 amounted to 88.2 per cent of that in 1930. The number of chain stores in Ontario increased during the same period from 137 in 1930 to 156 in 1933. In the Prairie Provinces, the number of chain stores remained relatively constant, and sales decreased from \$1,778,600 in 1930 to 66.6 per cent of that figure, or \$1,183,800, in 1933.

Table I.--Number of Chains, Stores, and Total Sales.

	1930	1931	1932	1933
Number of chains	31	32	32	29
Number of stores	292	305	313	301
Total Sales	\$13,971,300	\$13,584,000	\$12,521,100	\$11,001,700
Index of chain sales, 1930 = 100	100.0	97.2	89.6	78.7

Table II.--Number of Chains, Stores, and Sales, by Provinces, 1930 and 1933 Compared.

		1930	1933
CANADA, TOTAL --	Chains	31	29
	Stores	292	301
	Sales.	\$13,971,300	\$11,001,700
Index of chain sales, 1930 = 100		100.0	78.7
British Columbia --	Chains	4	3
	Stores	41	39
	Sales.	\$ 2,042,500	\$ 1,367,800
Index of chain sales, 1930 = 100		100.0	67.0
Prairie Provinces --	Chains	7	6
	Stores	37	36
	Sales.	\$ 1,778,600	\$ 1,183,800
Index of chain sales, 1930 = 100		100.0	66.6
Ontario --	Chains	11	13
	Stores	137	156
	Sales.	\$ 6,989,200	\$ 6,163,900
Index of chain sales, 1930 = 100		100.0	88.2
Quebec --	Chains	7	5
	Stores	54	45
	Sales.	\$ 2,367,900	\$ 1,648,200
Index of chain sales, 1930 = 100		100.0	69.6
Maritime Provinces --	Chains	4	4
	Stores	23	25
	Sales.	\$ 793,100	\$ 638,000
Index of chain sales, 1930 = 100		100.0	80.4

Table III.--Number of Chains, Stores, Employment and Wage Facts, Sales and Stocks, During 1933.

Number of chains	29
Number of stores	301
Employees and wages (including part-time) --	
Male	1,294
Female	296
Wages	\$ 1,494,900
Total Sales, 1933	\$11,001,700
Stocks on hand in stores, end of year, at cost	\$ 1,994,500

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS, 1934.

DRUG STORE CHAINS IN CANADA, 1934.

This preliminary report for the Census of Merchandising and Service Establishments shows that there were 30 drug store chains operating in Canada during 1934, and that these 30 chain companies operated 310 stores and had total sales for the year of \$11,714,300. This amount is 6.48 per cent greater than the sales of the 29 drug chains with 301 stores which were operating in 1933. Representing the total drug chain sales in 1930 by 100, sales for the following four years may be represented by 97.23 for 1931; 89.61 for 1932; 78.74 for 1933; and 83.85 for 1934.

The greatest percentage change in drug chain business in 1934 over that in 1933 took place in the province of Quebec where an increase of 13.92 per cent was registered. Increases in drug chain business in 1934 over 1933 for the other divisions or provinces are as follows: Prairie Provinces, 6.75 per cent; Maritime Provinces, 5.91 per cent; British Columbia 5.16 per cent; and Ontario, 4.79 per cent.

Part of the increase in drug chain business in 1934 over that in the preceding year is due to the slight increase in the number of units operated. Average sales per drug chain store in 1933, computed from the total chain sales and the average number of stores operating throughout the year, were \$37,041. The corresponding average for 1934 was \$38,789 or an increase of 4.72 per cent over that of the preceding year.

A preliminary report already published and comparing the sales of independent stores in 1933 and 1934 shows that for the Dominion as a whole the business of independent drug stores increased 4.11 per cent over the 1933 level. Increases in trade by drug chain units and by independent drug stores were, therefore, about equal, but the total business transacted by drug chains shows a somewhat greater change due to the variation in the number of chain units operated.

DRUG STORE CHAINS IN CANADA, 1930-1934.

Table I. - Number of Chains, Stores and Total Sales, by Years - 1930-1934.

	1930	1931	1932	1933	1934
Number of Chains	31	32	32	29	30
Number of Stores -					
Maximum	292	306	313	301	310
Average	284	299	305	297	302
Total Sales	\$13,971,300	13,534,600	12,520,000	11,001,300	11,714,300
Chain sales index - (1930=100)	100.00	97.25	89.61	78.74	83.85
Percentage change in Sales from preceding year	-	-2.77	-7.84	-12.13	+6.48

Table II - Number of Chains, Stores and Sales, by Provinces, 1930,
1933 & 1934 Compared.

		1930	1933	1934	Percentage change in sales (1933 & 1934)
CANADA, TOTAL	Chains	31	29	30	
	Stores	292	301	310	
	Sales	\$13,971,300	11,001,300	11,714,300	+ 6.48
British Columbia	Chains	4	3	3	
	Stores	41	39	41	
	Sales	2,042,500	1,367,500	1,438,100	+ 5.16
Prairie Provinces	Chains	7	6	6	
	Stores	37	36	37	
	Sales	\$ 1,778,600	1,183,800	1,263,700	+ 6.75
Ontario	Chains	11	13	13	
	Stores	137	156	161	
	Sales	\$ 6,989,200	6,163,300	6,459,200	+ 4.79
Quebec	Chains	7	5	6	
	Stores	54	45	45	
	Sales	\$ 2,367,900	1,648,200	1,877,600	+13.92
Maritime Provinces	Chains	4	4	4	
	Stores	23	25	26	
	Sales	\$ 793,100	638,000	675,700	+ 5.91

Table III. Number of Chains, Stores, Employment and Wage Facts, Sales
and Stocks during 1934.

Number of Chains	31
Number of Stores	312
Employees and wages (including part-timers) -	
Male	1,388
Female	309
Salaries and wages	\$ 1,555,400
Total Sales, 1934	\$11,821,200
Stocks on hand in stores, end of year at cost	\$ 2,133,300

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Drug Store Chains, 1941

The relative position occupied by chains in the drug retailing field has varied but little during the past twelve years according to results of the Census of Merchandising and Service Establishments for 1930 and 1941, the only two years for which complete surveys of the entire retail field have been made. There were 31 drug chain companies in the earlier period and these operated a total of 292 stores and had \$13,971,-300 sales, an amount which formed 18.2 per cent of the business transacted by all drug stores. By 1941 the number of chain organizations had increased to 39, the number of stores had risen to 361 and the volume of business transacted was \$18,849,500 or 18.7 per cent of the total sales of all drug stores including both chains and independents.

The 35 chain store companies operating in Canada in 1941 required the services of 1,674 full-time male and 857 full-time female employees to whom \$2,567,800 was paid in annual salaries and wages. In addition there were 192 part-time male and 132 part-time female employees who received a total of \$77,300. Inventories carried by drug chains at the end of 1941 were valued at \$3,728,100, of which store inventories amounted to \$2,936,100 and warehouse inventories were valued at \$792,000.

Chains are defined as groups of four or more stores under the same ownership and management and carrying on the same or similar kinds of business. Voluntary chains, consisting of independently operated units, grouped for buying or advertising purposes, are not included in the chain store figures quoted above. There were 1,018 units of these voluntary chains operating in the drug field in 1941 and these had annual sales of \$28,244,100.

Corporate chains account for a higher proportion of the total drug store trade in British Columbia than in any other region of the country. There were three chain organizations in this province in 1941 which operated 49 stores with \$2,575,-900 sales or 31.1 per cent of the total business of all drug stores. In 1930 the chain ratio was practically the same, standing at 31.3 per cent.

Ontario comes second in point of view of the proportion of total drug store business transacted by chains, 17 chain companies with 198 stores having sales of \$10,332,400 or 21.0 per cent of the total volume of business transacted by all drug stores. In 1930 the Ontario ratio was 19.9 per cent. There were 8 drug chain companies in Quebec in 1941 with 55 stores and \$3,106,100 sales or 17.2 per cent of the total for all drug stores including chains and independents. This represents a slight increase in the proportion of the total business transacted by chains from 1930 when the ratio was 15.9 per cent. Chains transacted 12.2 per cent of the total drug store business in the

Maritime Provinces in 1941 and 13.9 per cent in 1930. A decrease in chain ratio from 18.1 per cent in 1930 to 10.7 per cent in 1941 was also recorded in the Prairie Provinces.

Date of Present Ownership

A classification of the stores in operation in 1941 according to date of present ownership shows that of the 325 units which could be thus classified, 167 or more than one-half the total number were opened in 1929 or earlier; 82 stores or about one-quarter of the total were opened between 1930 and 1937 while the remainder were opened during the four-year period from 1938 to 1941.

Operating Expenses

Summary figures were secured on operating expenses, differentiating between overhead, warehouse and store expense with the latter division subdivided as between payroll, rentals and other operating costs. The results of this inquiry show that total operating expenses averaged 28.35 per cent of sales in 1941 of which store expense amounted to 24.64 per cent; overhead expense was 2.82 per cent and warehouse expense was 0.89 per cent. Slightly more than one-half the total store expense was comprised of payroll which formed 13.99 per cent of sales while other operating expenses including rentals formed 10.65 per cent of sales.

Operating expenses as a per cent of sales were slightly higher for the larger chains than for the smaller organizations. Total chain expense averaged 27.35 per cent of sales for 15 chains each with four or five units, 28.23 per cent of sales for 12 chains each having from 6 to 9 stores and 28.69 per cent of sales for 8 companies each having 10 units or more.

Practically all chain drug stores are operated in leased premises, 354 out of the 361 units being thus operated. Rentals averaged 4.99 per cent of sales for all leased premises and varied from 3.97 per cent of sales for the smaller chain companies to 5.35 per cent for the larger organizations.

Commodity Sales

Not all chain drug firms were able to break down their total annual sales for 1941 on a commodity basis. In particular, one or two large firms operating lunch counters in conjunction with their drug store business were unable to provide this information. Table 4 presents percentage distribution of drug chain sales for a group of 21 chain companies which furnished a satisfactory commodity breakdown. In order to provide a better basis with which to compare individual results, figures for meals have been excluded altogether.

Drugs and drug sundries formed slightly more than 50 per cent of the total business exclusive of meals; prescriptions comprised 13 per cent; patent medicines and compounds formed about 31 per cent, while drug sundries, rubber goods and sickroom supplies formed almost 9 per cent of the total. Toilet articles and preparations was the next most important item, accounting for 13.6 per cent of the total business followed by tobacco products with 12.1 per cent. Food and kindred products consisting of candy, confectionery and bottled beverages accounted for 7.3 per cent of the total sales while stationery, books and magazines accounted for another 3.8 per cent. Other items for which figures are shown in the table are cameras and photographic supplies, 2.8 per cent; household supplies (consisting chiefly of soaps) 3.2 per cent; receipts from services, 2.1 per cent; and professional and scientific instruments, 0.8 per cent.

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Table 1.--DRUG STORE CHAINS--Summary of Drug Store Chains, 1941

	ALL CHAINS	Chains with less than 6 units	Chains with 6 to 9 units	Chains with 10 or more units
A. Number of chains	35	15	12	8
B. Number of stores	361	62	84	215
C. (1) Store Sales total	\$18,849,500	\$3,572,900	\$3,284,400	\$11,992,200
(a) Sales of merchandise	\$16,263,400	2,878,400	2,878,800	\$10,508,200
(b) Receipts from sale of meals.	\$2,348,300	667,500	349,300	\$1,331,500
(c) Receipts from services	\$237,800	27,000	58,300	\$152,500
(2) Wholesale sales to other firms .	\$50,700	-	-	\$50,700
(3) Total chain sales	\$18,900,200	\$3,572,900	\$3,284,400	\$12,042,900
D. Store employment and payroll --				
Full-time employees:				
(1) Male employees, number	1,674	349	338	987
(2) Female employees, number	857	219	145	493
(3) Salaries and wages	\$2,567,800	\$521,600	\$462,600	\$1,583,600
Part-time employees:				
(1) Male employees, number	192	35	18	139
(2) Female employees, number	132	36	13	83
(3) Salaries and wages	\$77,300	\$15,300	\$6,800	\$54,700
E. Chain expenses --				
Store expenses:				
(1) Wage cost:				
Amount	\$2,645,100	\$537,400	\$469,400	\$1,638,300
Per cent of total sales	13.99	15.04	14.29	13.60
(2) Other expenses (including rent):				
Amount	\$2,012,600	\$370,200	\$345,200	\$1,297,200
Per cent of total sales	10.65	10.36	10.51	10.78
(3) Total store expenses:				
Amount	\$4,657,700	\$907,600	\$814,600	\$2,935,500
Per cent of total sales	24.64	25.40	24.80	24.38
(4) Overhead expenses:				
Amount	\$533,000	\$63,200	\$89,000	\$380,800
Per cent of total sales	2.82	1.77	2.71	3.16
(5) Warehouse expenses:				
Amount	\$168,200	\$6,300	\$23,500	\$138,400
Per cent of total sales	0.89	0.18	0.72	1.15
(6) Total chain expenses:				
Amount	\$5,358,900	\$977,100	\$927,100	\$3,454,700
Per cent of total sales	28.35	27.35	28.23	28.69
F. Rentals --				
1. Number of stores in leased premises	354	58	82	214
2. Sales of stores in leased premises	\$18,586,600	\$3,435,900	\$3,186,800	\$11,963,900
3. Rentals paid --				
Amount	\$927,700	\$136,300	\$151,300	\$640,100
Per cent of sales in leased premises	4.99	3.97	4.75	5.35
G. Inventories, end of 1941 --				
1. Store inventories	\$2,936,100	\$680,000	\$499,700	\$1,756,400
2. Warehouse inventories	\$792,000	\$77,300	\$91,500	\$623,200
3. Total inventories	\$3,728,100	\$757,300	\$591,200	\$2,379,600
H. Customers' accounts outstanding at the end of the year	\$159,800	\$57,200	\$54,400	\$48,200

Table 2. DRUG STORE CHAINS--Chain Units Classified According to Amount of Annual Sales

	1934				1937				1941			
	No.	Sales \$	Total %	Cum. %	No.	Sales \$	Total %	Cum. %	No.	Sales \$	Total %	Cum. %
CANADA, Total ..	306	11,594,000	100.00	-	332	14,163,300	100.00	-	361	19,849,500	100.00	-
\$1,000,000 and over	-	-	-	-	-	-	-	-	-	-	-	-
\$500,000-\$999,999	-	-	-	-	-	-	-	-	-	-	-	-
\$300,000-\$499,999	-	-	-	-	-	-	-	-	-	-	-	-
\$200,000-\$299,999	-	-	-	-	-	-	-	-	-	-	-	-
\$100,000-\$199,999	10	1,117,300	9.64	9.64	15	1,850,200	13.13	13.13	2	428,600	2.27	2.27
\$50,000-\$99,999	65	4,367,500	37.67	47.31	81	5,495,000	38.81	51.94	25	3,115,000	15.53	15.80
\$30,000-\$49,999	90	3,397,700	29.22	76.53	110	4,226,600	29.84	81.78	126	8,459,900	44.78	63.58
\$20,000-\$29,999	74	1,793,700	15.47	92.00	71	1,797,400	12.69	94.47	54	1,325,400	7.19	90.89
\$10,000-\$19,999	57	869,700	7.50	99.50	43	739,600	5.22	99.69	21	346,400	1.83	98.08
\$5,000-\$9,999	7	52,600	0.45	99.95	4	33,000	0.24	99.93	1	6,200	0.03	99.94
Less than \$5,000	3	5,700	0.05	100.00	3	10,500	0.07	100.00	3	11,100	0.06	100.00

Table 3. DRUG STORE CHAINS--Chain Units Classified by Provinces and Date of Establishment

Province	Total Units	Per cent of total units	Date of Present Ownership						Units which cannot be classified as to age
			1941	1938-1940	1934-1937	1930-1933	1920-1929	Before 1920	
CANADA, Total ..	361	100.00	6	70	37	45	132	35	36
Yukon and Northwest Territories	-	-	-	-	-	-	-	-	-
British Columbia ...	49	13.57	-	31	2	-	-	-	16
Alberta	20	5.54	1	3	-	3	8	5	-
Saskatchewan	7	1.94	1	-	1	-	4	1	-
Manitoba	10	2.77	-	1	-	-	9	-	-
Ontario	198	54.85	4	24	29	28	76	18	19
Quebec	55	15.24	-	11	4	8	26	5	1
New Brunswick	4	1.10	-	-	-	-	2	2	-
Nova Scotia	18	4.99	-	-	1	6	7	4	-
Prince Edward Island	-	-	-	-	-	-	-	-	-

Table 4.--Percentage Distribution of Drug Chain Sales, by Commodities, 1941

Commodity	Itemized Distribution	Group Totals Distribution
	%	%
All Commodities, less receipts from meals	-	100.00
Cameras and photographic supplies	-	2.79
Cigars, cigarettes, tobacco	-	12.11
Drugs and drug sundries, total	-	52.27
Prescriptions	12.99	-
Drugs, pharmaceuticals, patent medicines and compounds ..	30.64	-
Drug sundries, rubber goods, sickroom supplies	8.64	-
Food and kindred products, total	-	7.98
Candy, confectionery, nuts	8.64	-
Bottled beverages	1.64	-
Household supplies, total	-	3.21
Soaps, (laundry and toilet) and cleaning compounds	2.68	-
Other household supplies such as brooms, brushes, floor wax, etc.	53	-
Stationery, books, and magazines	-	3.76
Professional and scientific instruments	-	0.79
Toilet articles and preparations (except soaps), total	-	13.55
Toilet preparations and cosmetics	12.23	-
Toilet articles (brushes, combs, mirrors, etc.)	1.42	-
Miscellaneous merchandise	-	2.16
Receipts from repair and service operations	-	2.11

N.B. This table is based on returns from 21 firms giving a complete breakdown of sales by commodities and of which receipts from meals formed a minor part. In the entire group there were 27 firms having total sales of \$13,016,000 which includes \$2,345,300, or 18.04 per cent, from sale of meals.

Table 5.--Principal Statistics of Drug Store Chains, by Provinces
1930 and 1941

	1930	1941
(1)		
ANADA, Total --		
Number of chains	31	39
Number of stores, (maximum)	292	361
Net chain sales --		
Amount	\$13,971,300	\$ 18,849,500
Index, 1930 = 100	100.0	142.8
Total sales	\$76,848,900	\$100,930,400
%, chains to total	18.2	18.7
British Columbia --		
Number of chains	4	3
Number of stores, (maximum)	41	49
Net chain sales --		
Amount	\$ 2,042,500	\$ 2,575,900
Index, 1930 = 100	100.0	126.1
Total sales	\$ 6,530,400	\$ 8,277,000
%, chains to total	31.3	31.1
Prairie Provinces --		
Number of chains	7	6
Number of stores, (maximum)	37	37
Net chain sales --		
Amount	\$ 1,778,600	\$ 1,827,900
Index, 1930 = 100	100.0	102.8
Total sales	\$14,525,600	\$ 17,136,200
%, chains to total	12.2	10.7
Ontario --		
Number of chains	11	17
Number of stores, (maximum)	137	198
Net chain sales --		
Amount	\$ 6,989,200	\$ 10,332,400
Index, 1930 = 100	100.0	147.8
Total sales	\$35,207,500	\$ 49,208,500
%, chains to total	19.9	21.0
Quebec --		
Number of chains	7	8
Number of stores, (maximum)	54	55
Net chain sales --		
Amount	\$ 2,367,900	\$ 3,106,100
Index, 1930 = 100	100.0	131.2
Total sales	\$14,851,500	\$ 18,067,200
%, chains to total	15.9	17.2
Maritime Provinces --		
Number of chains	4	3
Number of stores, (maximum)	23	22
Net chain sales --		
Amount	\$ 793,100	\$ 1,007,200
Index, 1930 = 100	100.0	127.0
Total sales	\$ 5,699,100	\$ 8,271,500
%, chains to total	13.9	12.2

(1) Includes Yukon and North West Territories.

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OTTAWA, CANADA

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTSDRUG CHAINS IN CANADA, 1943SUMMARY

Results of a recent survey of the retail drug chains compiled by the Merchandising and Services Branch of the Dominion Bureau of Statistics indicate a continued expansion in their total sales volume from the previous all-time high attained in 1941. This was accompanied by a moderate decline in the number of stores operated in the two recent years and by a moderate decline in the number of companies which by definition must operate a minimum of four outlets to qualify as a retail chain. Total sales made by the 343 chain drug stores in 1942 amounted to \$19,711,700, an increase of 4.0 per cent over the 1941 dollar volume, while in 1943 the 336 outlets made sales of \$21,511,600, a gain of 9.1 per cent over the turnover of the preceding year. The drug chains were also able to maintain a comparatively stable inventory position, the valuation of their stocks at cost prices amounting to \$2,732,900 at the end of 1942 and to \$2,913,900 at the end of 1943 which compares with total inventories of \$2,936,100 shown by such systems at the end of 1941.

Continuation of the trend to larger sales-size stores was also apparent in the two years under review. Average sales of \$57,469 per store in 1942 exceeding by 10.1 per cent the comparable average of \$52,189 obtained in 1941, while average sales of \$64,023 per store in 1943 were 11.4 per cent greater than the average for the preceding calendar year. These increases were of course indicative of upward shifts in chain outlets from lower to higher sales-size categories. Thus in 1941, 153 stores with sales in excess of \$50,000 per outlet accounted for 63.2 per cent of the sales of all drug chains; in 1942, 184 stores were classified in this group whose turnover comprised 73.5 per cent of the total, while in 1943 the 193 units included in this classification contributed 76.5 per cent of the sales of all drug chains. Most of the remaining business of all drug chains was provided by stores in two of the five smaller sales-size categories, that is, outlets having sales between \$20,000 and \$29,999 and between \$30,000 and \$49,999 per store. These two groups comprised 185 units in 1941 which provided 34.9 per cent of all drug chain sales. In 1942 the 140 stores found here accounted for 25.2 per cent of all sales while in 1943 a total of 134 outlets transacted 22.9 per cent of the total volume of business.

No marked and consistent differences in the rates of increase in the sales of chain drug stores in 1942 and 1943 over immediately preceding years were revealed when such stores were classified between those operating soda fountains and those not so equipped. Chain drug stores with soda fountains showed an expansion of

11.0 per cent in total sales for 1942 over their 1941 volume and an increase of only 11.6 per cent in 1943 over the preceding year. Chain outlets without soda fountains, however, recorded in 1942 the greater gain of 15.2 per cent over 1941 but in 1943 this rate of expansion dropped to 10.8 per cent. It should be noted that no data were collected in the two recent years by kinds of stores operated. Figures shown in Table IX are therefore based on those continuing units which provided sales information for 1941 according to these sub-divisions.

British Columbia, Ontario and the Maritime Provinces were the only regional areas in which the drug chains showed consistent increases in sales volume in 1942 and 1943 over the immediately preceding years. Drug chains in British Columbia were particularly outstanding in this respect recording gains of 20.9 per cent in 1942 and 18.9 per cent in 1943 which compares with increases of 3.4 per cent and 6.1 per cent shown for such systems in Ontario and 17.8 per cent and 5.4 per cent for the Maritime Provinces. Drug chains in both the Prairie Provinces and Quebec experienced declines of 10.0 per cent and 4.2 per cent in 1942 and increases of 4.1 per cent and 14.2 per cent in sales in 1943 over volumes obtained in the earlier year. Due to these disparities in the rate of change, drug chains operating in British Columbia in 1942 moved into second place in amount of business transacted replacing in this respect the drug chains operating in the province of Quebec.

Activities of the drug chains remained pre-eminently concentrated in the larger urban centers having 100,000 or more people. Overall, 64.7 per cent of the total sales of the drug chains were made in such places in 1941, the ratio rising slightly to 65.5 per cent in 1942 and to 66.0 per cent in 1943. The distribution of sales by provinces or economic regions, however, varied somewhat from the Dominion totals. Thus in 1943 slightly over 86 per cent of the sales of drug chains operating in the province of Quebec was transacted in places of 100,000 or more people, and in Ontario 68.0 per cent of the sales of drug chains operating in that province were transacted in these larger urban centers.

Stability for the most part characterized the distributions of sales when the drug chains were classified according to size factors and according to types of operation. Concerns operating 10 or more stores obtained 63.3 per cent of total chain sales in 1941, 65.9 per cent in 1942 and 65.4 per cent in 1943. Eight chain systems reported company sales of \$500,000 or over in all three periods, together accounting for 65.7 per cent, 68.5 per cent and 68.8 per cent of aggregate turnover in the respective years. Medium-sized chains with annual sales between \$200,000 and \$499,999 gained relatively from the smallest group with annual sales between \$200,000 and \$299,999 per company, obtaining 16.9 per cent of total sales in 1941, 17.5 per cent in 1942 and 20.7 per cent in 1943. The final classification by types of chain indicated that provincial and national chains, that is those operating in one or more provinces, contributed 62.8 per cent of the total sales in 1941, 63.5 per cent in 1942 and 63.1 per cent in 1943, the balance of the business being accounted for by local chain systems.

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Table 1.--Number of Drug Chains, Stores and Sales for Selected Years.

	1930	1937	1941	1942	1943
Number of chains	31	31	35	31	31
Number of stores (maximum)	292	332	363	343	336
Total Sales (retail)	\$13,971,300	\$14,163,300	\$18,944,500	\$19,711,700	\$21,511,600
Chain sales index (1930=100)	100.0	101.4	135.6	141.1	154.0
Percentage change in sales from preceding calendar year	-	+ 10.0	+ 21.3	+ 4.0	+ 9.1

Table 2.--Principal Statistics of Drug Chains, 1941, 1942 and 1943.

	1941	1942	1943
Number of chains	35	31	31
Number of stores (maximum)	363	343	336
Total sales (retail)	\$18,944,500	\$19,711,700	\$21,511,600
Average sales per store	\$ 52,189	\$ 57,469	\$ 64,023
Per cent change from preceding calendar year	+ 18.3	+ 10.1	+ 11.4
Salaries and wages (Store employees)	\$ 2,645,100	\$ 2,579,700	\$ 2,849,900
Stocks on hand end of year, at cost	\$ 2,936,100	\$ 2,732,300	\$ 2,913,900
In retail stores	\$ 792,000	\$ 699,400	\$ 734,100
In warehouses	\$ 3,728,000	\$ 3,432,300	\$ 3,648,000
Total stocks on hand			
Customer's accounts outstanding at December 31	\$ 159,800	(1)	\$ 93,300

(1) Not reported.

Table 3.--Number of Drug Chains, Stores, Retail and Sales, by Provinces, 1941, 1942 and 1943.

		1941		1942		1943	
CANADA	No. of chains		35		31		31
	No. of stores		363		343		336
	Sales	(1)	\$18,944,500		\$19,711,700		\$21,511,600
	Index 1930=100		135.6		141.1		154.0
	% change from preceding year		+ 21.3		+ 4.0		+ 9.1
	Average sales per store		\$ 52,189		\$ 57,469		\$ 64,023
British Columbia	No. of chains		3		3		3
	No. of stores		49		49		48
	Sales		\$ 2,575,900		\$ 3,113,300		\$ 3,703,200
	Index 1930=100.0		126.1		152.4		181.3
	% change from preceding year		+ 13.7		+ 20.9		+ 18.9
	Average sales per store		\$ 52,569		\$ 63,537		\$ 77,150
Prairie Provinces	No. of chains		6		4		4
	No. of stores		37		27		26
	Sales		\$ 1,827,900		\$ 1,645,600		\$ 1,712,700
	Index 1930=100.0		102.8		92.5		96.3
	% change from preceding year		+ 11.9		- 10.0		+ 4.1
	Average sales per store		\$ 49,402		\$ 60,948		\$ 65,873
Ontario	No. of chains		17		16		16
	No. of stores		198		189		186
	Sales		\$10,332,400		\$10,678,800		\$11,328,100
	Index 1930=100.0		147.8		152.8		162.1
	% change from preceding year		+ 22.4		+ 3.4		+ 6.1
	Average sales per store		\$ 52,184		\$ 56,502		\$ 60,904
Quebec	No. of chains		8		7		7
	No. of stores		55		51		51
	Sales		\$ 3,106,100		\$ 2,975,200		\$ 3,398,400
	Index 1930=100.0		131.2		125.6		143.5
	% change from preceding year		+ 26.4		- 4.2		+ 14.2
	Average sales per store		\$ 56,475		\$ 58,239		\$ 66,635
Maritime Provinces	No. of chains		3		3		3
	No. of stores		24		24		24
	Sales	(1)	\$ 1,102,200		\$ 1,298,800		\$ 1,369,200
	Index 1930=100.0		127.0		163.8		172.6
	% change from preceding year		+ 28.6		+ 17.8		+ 5.4
	Average sales per store		\$ 45,925		\$ 54,117		\$ 57,050

Table 4.--Drug Chains Classified according to Number of Stores Operated, 1941, 1942 and 1943.

Number of Units	1941				1942			
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
All drug chains, Total	35	363	\$ 18,944,500	100.0	31	343	\$ 19,711,700	100.0
Less than 6 units	14	58	3,282,900	17.3	12	51	2,926,200	14.8
6 - 9 units	13	90	3,669,400	19.4	11	75	3,798,000	19.3
10 units and over	8	215	11,992,200	63.3	8	217	12,987,500	65.9

Number of Units	1943			
	Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total
All drug chains, Total	31	336	\$ 21,511,600	100.0
Less than 6 units	13	56	3,451,400	16.1
6 - 9 units	10	69	3,982,300	18.5
10 units and over	8	211	14,077,900	65.4

Table 5.--Drug Chains Classified According to Amount of Annual Sales, 1941, 1942, 1943.

Annual Sales	1941				1942			
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
All drug chains, Total	35	363	\$18,944,500	100.0	31	343	\$19,711,700	100.0
\$500,000 and over	8	207	12,443,000	65.7	8	209	13,504,000	68.5
\$300,000 - \$499,999	9	61	3,206,100	16.9	9	61	3,442,200	17.5
\$200,000 - \$299,999	7	42	1,625,400	8.6	6	39	1,500,100	7.6
Less than \$200,000	11	53	1,670,000	8.8	8	34	1,265,400	6.4

Annual Sales	1943			
	Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total
All drug chains, Total	31	336	\$21,511,600	100.0
\$500,000 and over	8	203	14,804,500	68.8
\$300,000 - \$499,999	11	73	4,453,200	20.7
\$200,000 - \$299,999	5	29	1,151,300	5.4
Less than \$200,000	7	31	1,102,600	5.1

Table 6.--Drug Chains Classified According to Type of Operation, 1941, 1942 and 1943.

	1941				1942		
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales
			Amount	Per cent of total			Amount
All drug chains, Total	35	363	\$ 18,944,500	100.0	31	343	\$ 19,711,700
Local chains	25	157	7,053,300	37.2	23	145	7,187,800
Provincial & national chains	10	206	11,891,200	62.8	8	198	12,523,900
							100.0
							36.5
							63.5

	1943			
	Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total
All drug chains, Total	31	336	\$ 21,511,600	100.0
Local chains	23	144	7,933,400	36.9
Provincial & national chains .	8	192	13,578,200	63.1

Table 5.-- Drug Chains, 1941, 1942 and 1943.
Stores and Sales Classified According to Economic Regions and Size of Locality.

	All Localities				Stores and sales in places having populations of --			
	No. of Stores	Sales		Stores	Over 100,000		30,000 - 100,000	
		Value \$	%		Sales \$	Per cent of total	Per cent of total	
CANADA, Total	363	18,944,500	100.0	227	12,262,100	64.7	3,851,900	20.3
British Columbia	49	2,575,900	100.0	42	(x)	(x)	(x)	(x)
Prairie Provinces	27	1,827,900	100.0	9	(x)	(x)	1,022,100	55.9
Ontario	198	10,332,400	100.0	129	6,965,200	67.4	1,582,800	15.3
Quebec	55	3,106,100	100.0	47	2,705,500	87.1	(x)	(x)
Maritime Provinces	24	1,102,200	100.0	-	-	-	752,200	68.2
1 9 4 2								
CANADA, Total	343	19,711,700	100.0	222	12,915,000	65.5	3,866,500	19.6
British Columbia	49	3,113,300	100.0	42	(x)	(x)	(x)	(x)
Prairie Provinces	27	1,645,600	100.0	9	(x)	(x)	828,200	50.3
Ontario	192	10,678,800	100.0	127	7,267,200	68.0	1,570,000	14.7
Quebec	51	2,975,200	100.0	44	2,574,200	86.5	(x)	(x)
Maritime Provinces	24	1,298,800	100.0	-	-	-	935,900	72.1
1 9 4 3								
CANADA, Total	336	21,511,600	100.0	216	14,199,800	66.0	4,175,700	19.4
British Columbia	48	3,703,200	100.0	41	(x)	(x)	(x)	(x)
Prairie Provinces	26	1,712,700	100.0	8	(x)	(x)	875,100	51.1
Ontario	187	11,328,100	100.0	123	7,697,700	68.0	1,736,900	15.3
Quebec	51	3,398,400	100.0	44	2,994,300	86.3	(x)	(x)
Maritime Provinces	24	1,369,200	100.0	-	-	-	955,800	69.8

Table 8.--Drug Chains, 1941, 1942 and 1943.

Table 9.---Drug Chain Stores and Sales Classified According to Kinds of Stores Operated.
 (Based on continuing stores)
 (1941 - 1943 inclusive)

Kinds of Stores Operated	Number of Stores	S A L E S				Per cent change 1943/1942
		1941	1942	Per cent change 1942/1941	1943	
TOTAL, ALL DRUG CHAIN STORES	563	18,944,500	19,711,700	+ 4.0	21,511,600	+ 9.1
Total continuing drug chain stores	307	16,227,500	18,391,800	+ 13.5	20,435,200	+ 11.1
Drug chain stores with soda fountain	120	7,177,000	7,969,900	+ 11.0	8,892,200	+ 11.6
Drug chain stores without soda fountain ..	187	9,050,500	10,421,900	+ 15.2	11,543,000	+ 10.8

Note: No data were collected for 1942 and 1943 by kinds of stores operated, that is, those with soda fountains and those without. This table is based on the 307 chain drug stores which in 1941 provided this information, it being assumed that no extensive changes of this nature have occurred since that time.

LIST OF DRUG CHAINS IN CANADA, 1943.

American Drug Stores, The	1187 St. Catherine St. W.,	Montreal, Que.
Barne's Drug Company	2 Queen St. E.,	Sault Ste Marie, Ont.
Buckley's Ltd.,	161 Spring Garden Rd.,	Halifax, N.S.
Cairncross and Lawrence Ltd.,	216 Dundas St.,	London, Ont.
Cunningham Drug Stores, Ltd.,	456 Broadway St., W.,	Vancouver, B.C.
Gray's Super Value Drug Stores Reg'd	417 St. James St. W.,	Montreal, Que.
Isaacson, Wilfred	3056 Yonge St.,	Toronto, Ont.
Lanspeary's Ltd.,	1394 Ouellette Ave.,	Windsor, Ont.
Leduc Pharmacies	1416 Bleury St.,	Montreal, Que.
Liggett, Louis K. Co. Ltd.,	579 Richmond St. W.,	Toronto, Ont.
Macy's Drug Stores, Reg'd	1411 Stanley St.,	Montreal, Que.
MacLeod-Balcom Ltd.,	55 Argyle St.,	Halifax, N.S.
McNally, E. C., Estate	357 Queen St.,	Niagara Falls, Ont.
Marshall's Drug Stores	542 Queen St. W.,	Toronto, Ont.
Martineau Pharmacies, The	857 rue St. Maurice,	Montreal, Que.
Merrick Drug Stores, Ltd.,	208 Birks Bldg.,	Edmonton, Alta.
Owl Drug Stores Ltd.,	251 Carlton St.,	Toronto, Ont.
Owl Drug Co., Ltd.,	301-6, 193 East Hastings,	Vancouver, B.C.
Paterson's Drug Stores, Ltd.,	3206 Sandwich St., W.,	Windsor, Ont.
Pharmacies Melrose	5639 Verdun Ave.,	Verdun, Que.
Pond's Drug Stores, Ltd.,	301 Ouellette Ave.,	Windsor, Ont.
Reliable Drug Store	1850 Commercial Drive,	Vancouver, B.C.
Robert's Drug Stores, Ltd.,	645 Logan Ave.,	Winnipeg, Man.
Ross Drug Co. Ltd. & Ross Drug United, Ltd.,	66 King St.,	Woodstock, N.B.
Rutherford's Drug Stores	248 Bay St.,	Toronto, Ont.
Sloane Drug Stores, Ltd.,	9434-111th Ave.,	Edmonton, Alta.
Sonley's Drug Stores,	1023 Pape Ave.,	Toronto, Ont.
Standard Drug Ltd., The	105 Stanley St.,	London, Ont.
Tamblyn, G., Ltd.,	225 Jarvis St.,	Toronto, Ont.
Walker Drug Co., Ltd.,	1879 Ferry St.,	Niagara Falls, Ont.
Ward and Hamilton Drugs, Ltd.,	400 Princess St.,	Kingston, Ont.

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DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES BRANCH
OTTAWA, CANADA

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DRUG CHAINS IN CANADA, 1944

SUMMARY

Results of the annual survey of retail drug chains made by the Bureau of Statistics show that there were 29 drug chain companies operating in Canada last year and these had a total of 323 retail outlets with \$23,004,500 sales. This represents an increase of 4.6 per cent over the volume of business transacted in 1943 by 32 chain companies which operated 341 stores. For purposes of these annual surveys, chains are taken to include all groups of four or more retail outlets under the same ownership and management. Groups of two or three stores are not considered as belonging to the chain store category.

The 4.6 per cent increase in drug chain sales in 1944 over the preceding year compares with an estimated average increase of 8 per cent for all drug stores including both chains and independents. Although this average gain must be considered as an estimate it can be considered sufficiently reliable to indicate that the increase for chains was somewhat less than that for independent stores.

Salaries and wages paid to store employees totalled \$3,096,100 in 1944 compared with \$2,935,000 for 1943. Year-end inventories totalled \$3,476,700 at the end of 1944 compared with \$3,697,600 at the close of the preceding year. Customers' accounts outstanding at the end of 1944 totalled \$93,600, practically unchanged from the amount reported as being on the books at the end of 1943.

While all regions of the country reported increased chain sales in 1944 over 1943 the extent of the increase varied. British Columbia reported the greatest increase with a gain of 10 per cent. Sales in the Prairie Provinces and in Quebec were 7 per cent higher in 1944 than in 1943 while lesser gains were reported for the other regions.

The following tables present the usual analyses of drug chains for 1944 together with comparable figures for earlier years. In a considerable number of instances figures for 1943 have been revised.

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Table 1.--Number of Drug Chains, Number of Stores and Value of Sales, Canada, 1930 and 1941-1944

	1930	1941	1942	1943(1)	1944
Number of chains	31	35	31	32	29
Number of stores (maximum)	292	363	343	341	323
Total Sales (retail)	\$13,971,300	\$18,944,500	\$19,711,700	\$21,997,400	\$23,004,500
Chain sales index (1930=100)	100.0	135.6	141.1	157.4	164.7
Percentage change in sales from preceding calendar year	-	+ 21.3	+ 4.0	+ 11.6	+ 4.6

Table 2.--Principal Statistics of Drug Chains, Canada, 1941-1944

	1941	1942	1943(1)	1944
Number of chains	35	31	32	29
Number of stores (maximum)	363	343	341	323
Total sales (retail)	\$18,944,500	\$19,711,700	\$21,997,400	\$23,004,500
Average sales per store	\$ 52,189	\$ 57,469	\$ 64,509	\$ 71,221
Per cent change from preceding calendar year	+ 18.3	+ 10.1	+ 12.3	+ 10.4
Salaries and wages (Store employees)	\$ 2,645,100	\$ 2,579,700	\$ 2,935,000	\$ 3,096,100
Stocks on hand end of year, at cost	\$ 2,936,100	\$ 2,732,900	\$ 2,840,400	\$ 2,743,000
In retail stores	\$ 792,000	\$ 699,400	\$ 757,200	\$ 733,700
In warehouses	\$ 3,728,100	\$ 3,432,300	\$ 3,697,600	\$ 3,476,700
Total stocks on hand				
Customer's accounts outstanding at December 31	\$ 159,800	(2)	\$ 93,300	\$ 93,600

(1) Revised figures

(2) Not available

Table 3.--Number of Drug Chains, Number of Stores and Value of Sales, by Provinces, 1941-1944

	1941			1942	1943(1)	1944
CANADA	No. of chains	35	31	32	29	
	No. of stores	363	343	341	323	
	Sales (Amount)	\$18,944,500	\$19,711,700	\$21,997,400	\$23,004,500	
	Index, 1930=100	185.6	141.1	157.4	164.7	
	% change from preceding year	+ 21.3	+ 4.6	+ 11.6	+ 4.6	
	Average per store	\$ 52,189	\$ 57,469	\$ 64,509	\$ 71,221	
British Columbia	No. of chains	3	3	3	3	
	No. of stores	49	49	48	48	
	Sales (Amount)	\$ 2,575,900	\$ 3,113,300	\$ 3,703,200	\$ 4,083,000	
	Index, 1930=100	126.1	152.4	181.3	193.9	
	% change from preceding year	+ 15.7	+ 20.9	+ 18.9	+ 10.3	
	Average per store	\$ 52,569	\$ 63,537	\$ 77,150	\$ 84,063	
Prairie Provinces	No. of chains	6	4	5	5	
	No. of stores	37	27	31	32	
	Sales (Amount)	\$ 1,827,900	\$ 1,645,600	\$ 2,198,500	\$ 2,347,200	
	Index, 1930=100	102.8	92.5	123.6	132.0	
	% change from preceding year	+ 11.9	- 10.0	+ 33.6	+ 6.8	
	Average per store	\$ 49,402	\$ 60,948	\$ 70,919	\$ 73,350	
Ontario	No. of chains	17	16	16	13	
	No. of stores	198	189	186	172	
	Sales (Amount)	\$10,332,400	\$10,678,800	\$11,328,100	\$11,525,900	
	Index, 1930=100	147.8	152.8	162.1	164.9	
	% change from preceding year	+ 22.4	+ 3.4	+ 6.1	+ 1.7	
	Average per store	\$ 52,184	\$ 56,502	\$ 60,904	\$ 67,011	
Quebec	No. of chains	8	7	7	7	
	No. of stores	55	51	51	47	
	Sales (Amount)	\$ 3,106,100	\$ 2,975,200	\$ 3,398,400	\$ 3,631,500	
	Index, 1930=100	131.2	125.6	143.5	153.4	
	% change from preceding year	+ 26.4	- 4.2	+ 14.2	+ 6.9	
	Average per store	\$ 56,475	\$ 58,239	\$ 66,635	\$ 77,266	
Maritime Provinces	No. of chains	3	3	3	3	
	No. of stores	24	24	24	24	
	Sales (Amount)	\$ 1,102,200	\$ 1,298,800	\$ 1,369,200	\$ 1,416,900	
	Index, 1930=100	127.0	163.8	178.6	178.7	
	% change from preceding year	+ 28.6	+ 17.8	+ 5.4	+ 3.5	
	Average per store	\$ 45,925	\$ 54,117	\$ 57,050	\$ 59,038	

Table 4.--Drug Chains Classified According to Number of Stores Operated, 1941-1944

Number of Units	1941				1942			
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
All drug chains, Total	35	363	\$ 18,944,500	100.0	31	343	\$ 19,711,700	100.0
Less than 6 units	14	58	3,282,900	17.3	12	51	2,926,200	14.8
6 - 9 units	13	90	3,669,400	19.4	11	75	3,798,000	19.3
10 units and over	8	215	11,992,200	63.3	8	217	12,987,500	65.9

Number of Units	1943(1)				1944			
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
All drug chains, Total	32	341	\$ 21,997,400	100.0	29	323	\$ 23,004,500	100.0
Less than 6 units	14	61	3,937,200	17.9	11	48	3,610,100	15.7
6 - 9 units	10	69	3,982,300	18.1	10	67	4,228,900	18.4
10 units and over	8	211	14,077,900	64.0	8	208	15,165,500	65.9

(1) Revised figures

Table 5.--Drug Chains Classified According to Amount of Annual Sales, 1941-1944

Annual Sales	1 9 4 1				1 9 4 2			
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
All drug chains, Total	35	363	\$ 18,944,500	100.0	31	343	\$ 19,711,700	100.0
\$500,000 and over	8	207	12,443,000	65.7	8	209	13,504,000	68.5
\$300,000 - \$499,999	9	61	3,206,100	16.9	9	61	3,442,200	17.5
\$200,000 - \$299,999	7	42	1,625,400	8.6	6	39	1,500,100	7.6
Less than \$200,000	11	53	1,670,000	8.8	8	34	1,265,400	6.4

Annual Sales	1 9 4 3 (1)				1 9 4 4			
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
All drug chains, Total	32	341	\$ 21,997,400	100.0	29	323	\$ 23,004,500	100.0
\$500,000 and over	9	208	15,290,300	69.6	13	234	18,587,600	80.8
\$300,000 - \$499,999	11	73	4,453,200	20.2	7	45	2,734,700	11.9
\$200,000 - \$299,999	5	29	1,151,300	5.2	5	24	1,086,600	4.7
Less than \$200,000	7	31	1,102,600	5.0	4	20	595,600	2.6

(1) Revised figures

Table 6.--Drug Chains Classified According to Type of Operation, 1941-1944

	1941					1942				
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales		Per cent of total	Per cent of total
			Amount	Per cent of total			Amount	Per cent of total		
All drug chains, Total	35	363	\$ 18,944,500	100.0	31	343	\$ 19,711,700	100.0		
Local chains	25	157	7,053,300	37.2	23	145	7,187,800	36.5		
Provincial & national chains.	10	206	11,891,200	62.8	8	198	12,523,900	63.5		

	1943(1)					1944				
	Number of Chains	Number of Stores	Total Sales		Number of Chains	Number of Stores	Total Sales		Per cent of total	Per cent of total
			Amount	Per cent of total			Amount	Per cent of total		
All drug chains, Total	32	341	\$ 21,997,400	100.0	29	323	\$ 23,004,500	100.0		
Local chains	24	149	8,419,200	38.3	21	133	8,304,900	36.1		
Provincial & national chains.	8	192	13,578,200	61.7	8	190	14,699,600	63.9		

(1) Revised figures

Table 7.--Drug Chains - Chain Units Classified According to Amount of Annual Sales, 1941-1944

Annual Sales	1941			1942		
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales
CANADA, Total	363	\$18,944,500	100.0	-	343	\$19,711,700
\$200,000 - \$299,999	2)	3,543,600	18.6	18.6	-	-
\$100,000 - \$199,999	25)	8,439,900	44.6	63.2	39	5,057,600
\$50,000 - \$49,999	126	5,241,900	27.7	90.9	145	9,421,800
\$30,000 - \$29,999	131	1,355,400	7.2	98.1	93	3,764,200
\$20,000 - \$19,999	54	346,400	1.8	99.9	47	1,211,700
\$10,000 - \$9,999	21	6,200	(1)	-	16	251,400
\$5,000 - \$4,999	1	11,100	0.1	100.0	-	-
Less than \$5,000	3	-	-	-	3	5,000
						(1)
						100.0

Annual Sales	1943(2)			1944		
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales
CANADA, Total	341	\$21,997,400	100.0	-	323	\$23,004,500
\$200,000 - \$299,999	2)	6,369,000	29.0	29.0	1)	8,203,700
\$100,000 - \$199,999	43)	10,540,400	47.9	76.9	56)	10,959,500
\$50,000 - \$49,999	152	4,044,500	18.4	95.3	156	3,045,200
\$30,000 - \$29,999	99	925,300	4.2	99.5	75	638,800
\$20,000 - \$19,999	36	97,400	0.4	99.9	24	146,000
\$10,000 - \$9,999	6	20,800	0.1	100.0	9	8,000
\$5,000 - \$4,999	3	-	-	-	1	3,300
Less than \$5,000	-	-	-	-	1	-
						(1)
						100.0

(1) Less than decimal one per cent

(2) Revised figures

LIST OF DRUG CHAINS IN CANADA, 1944

American Drug Stores, The	1187 St. Catherine St. W.	Montreal, Que.
Barne's Drug Company	3 Queen St. E.	Sault Ste. Marie, Ont.
Buckley's Ltd.,	161 Spring Garden Rd.,	Halifax, N. S.
Cairncross and Lawrence Ltd.,	216 Dundas St.,	London, Ont.
Cunningham Drug Stores, Ltd.,	456 Broadway St., W.,	Vancouver, B.C.
Gray's Super Value Drug Stores Reg'd	417 St. James St. W.,	Montreal, Que.
Lanspeary's Ltd.,	1394 Ouellette Ave.,	Windsor, Ont.
Leduc Drug Co., Dr.	630 Dorchester St.,	Montreal, Que.
Liggett, Louis K. Co. Ltd.,	579 Richmond St. W.,	Toronto, Ont.
Macy's Drug Stores, Reg'd	1411 Stanley St.,	Montreal, Que.
MacLeod-Balcom Ltd.,	55 Argyle St.,	Halifax, N.S.
McNally, E. C., Estate	357 Queen St.,	Niagara Falls, Ont.
Marshall's Drug Stores	310 Queen St. E.,	Toronto, Ont.
Merrick Drug Stores, Ltd.,	9627-105A. Ave.,	Edmonton, Alta.
Owl Drug Stores Ltd.,	251 Carlton St.,	Toronto, Ont.
Owl Drug Co., Ltd.,	301-6, 193 East Hastings,	Vancouver, B.C.
Paterson's Drug Stores, Ltd.,	3206 Sandwich St., W.,	Windsor, Ont.
Pharmacie Martineau	857 rue St. Maurice,	Montreal, Que.
Pharmacies Melrose	5639 Verdun Ave.,	Verdun, Que.
Pond's Drug Stores, Ltd.,	301 Ouellette Ave.,	Windsor, Ont.
Reliable Drug Store	1850 Commercial Drive,	Vancouver, B.C.
Ringers Drug Stores	432 Main St.,	Winnipeg, Man.
Robert's Drug Stores, Ltd.,	645 Logan Ave.,	Winnipeg, Man.
Ross Drug Co. Ltd. & Ross Drug United, Ltd.,	66 King St.,	Woodstock, N.B.
Rutherford's Drug Stores	248 Bay St.,	Toronto, Ont.
Sloane Drug Stores, Ltd.,	431 Tegler Bldg.,	Edmonton, Alta.
Standard Drug Ltd., The	105 Stanley St.,	London, Ont.
Tamblyn, G., Ltd.,	225 Jarvis St.,	Toronto, Ont.
Walker Drug Co., Ltd.,	1879 Ferry St.,	Niagara Falls, Ont.

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Minister of Trade and Commerce

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

DRUG STORE CHAINS

IN

CANADA

1945



OTTAWA
1946

Price 25 cents

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DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES STATISTICS
OTTAWA, CANADA

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DRUG STORE CHAINS IN CANADA, 1945

There were 27 drug store chains operating in Canada during the year 1945 according to the annual survey of chain stores made by the Dominion Bureau of Statistics. These 27 companies had 309 retail outlets with sales amounting to \$24,126,300 in that year. These sales represent a 4.9 per cent increase over the dollar volume of business transacted by 29 chain companies through their 323 retail stores in the previous year. For the purpose of these annual surveys, chains are considered to be those companies operating four or more retail outlets under the same ownership. Two- and three-store groups are not included in the chain store survey.

In comparison with the chain increase in sales of 4.9 per cent, an estimated increase for all drug stores in 1945 over the previous year stands at 6.6 per cent. An average-sales-per-store comparison, however, shows an increase of 9.6 per cent over the previous year for chain stores. This increase in average sales per store was a continuation of the trend towards larger sales-size stores which has been in evidence since 1941.

Salaries and wages paid to store employees totalled \$3,225,900 as compared with the 1944 total of \$3,096,100. Inventories were valued at \$3,756,500 at the end of 1945, revealing a substantial increase over 1944 as well as over previous years. Customers' accounts outstanding at the end of 1945 were \$103,000 compared with \$93,600 for 1944, an increase of 10 per cent which was somewhat in excess of the sales increase of 4.9 per cent.

While all regions of the country recorded increases in drug chain sales, British Columbia and the Prairie Provinces led with increases of 10 per cent and 9 per cent, respectively over 1944. Sales in Quebec were up 5 per cent; in Ontario, 3 per cent; while an increase of 1 per cent over the already high volume of 1944 was registered in the Maritime Provinces.

As shown in Table 5, chains in the largest dollar volume category continued to account for an increasingly large proportion of the total sales for all chains. Drug chain companies with sales of over \$500,000 did 82 per cent of the business of all drug chains in 1945. Another 13 per cent was handled by firms with annual sales of between \$200,000 and \$400,000, while chains in the two smallest size categories together accounted for less than 5 per cent of the business.

Table 7 classifying individual stores by size of business indicates that 67 stores with annual sales of \$100,000 or over were responsible for 40.7 per cent of all chain drug store sales in 1945. Last year there were 57 stores in this group and these accounted for 35.7 per cent of the total sales of drug chains.

Table 1. Number of Drug Chains, Number of Stores and Value of Sales, Canada, 1930 and 1941-1945.

	1930	1941	1943	1944	1945
Number of chains	31	35	32	29	27
Number of stores (maximum)	292	363	341	323	309
Total sales (retail)	\$13,971,300	\$18,944,500	\$21,997,400	\$23,004,500	\$24,126,300
Chain sales index (1930=100) ...	100.0	135.6	157.4	164.7	172.7
Percentage change in sales from preceding year	-	+ 21.3	+ 11.6	+ 4.6	+ 4.9

Table 2. Principal Statistics of Drug Chains, Canada, 1941-1945

	1941	1943	1944	1945
Number of chains	35	32	29	27
Number of stores (maximum)	363	341	323	309
Total sales (retail)	\$18,944,500	\$21,997,400	\$23,004,500	\$24,126,300
Average sales per store	\$ 52,189	\$ 64,509	\$ 71,221	\$ 78,079
Per cent change from preceding year	+ 18.3	+ 12.3	+ 10.4	+ 9.6
Salaries and wages (store employees)	\$ 2,645,100	\$ 2,935,000	\$ 3,096,100	\$ 3,225,900
Stocks on hand, end of year, at cost				
In retail stores	\$ 2,936,100	\$ 2,940,400	\$ 2,743,000	\$ 3,083,100
In warehouses	\$ 792,000	\$ 757,200	\$ 732,700	\$ 673,400
Total stocks on hand	\$ 3,728,100	\$ 3,697,600	\$ 3,475,700	\$ 3,756,500
Customers' accounts outstanding at December 31	\$ 159,800	\$ 93,300	\$ 93,600	\$ 103,000

Table 4. Drug Chains Classified According to Number of Stores Operated, 1941-1945

Number of units	1 9 4 1					1 9 4 3				
	Number of chains	Number of stores	Total sales		Per cent of total	Number of chains	Number of stores	Total sales		Per cent of total
			Amount	\$				Amount	\$	
Drug chains, Total	35	363	18,944,500		100.0	32	341	21,997,400		100.0
Less than 6 units	14	58	3,282,900		17.3	14	61	3,937,200		17.9
6 - 9 units	13	90	3,669,400		19.4	10	69	3,982,300		18.1
10 units and over	8	215	11,992,200		63.3	8	211	14,077,900		64.0

Number of units	1 9 4 4					1 9 4 5				
	Number of chains	Number of stores	Total sales		Per cent of total	Number of chains	Number of stores	Total sales		Per cent of total
			Amount	\$				Amount	\$	
Drug chains, Total	29	323	23,004,500		100.0	27	309	24,126,300		100.0
Less than 6 units	11	43	3,610,100		15.7	10	44	3,711,800		15.4
6 - 9 units	10	67	4,228,900		18.4	9	59	4,340,400		18.0
10 units and over	8	208	15,165,500		65.9	8	206	16,074,100		66.6

Table 5. Drug Chains Classified According to Amount of Annual Sales, 1941-1945

Annual sales	1 9 4 1				1 9 4 3			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	35	363	\$ 18,944,500	100.0	32	341	\$ 21,997,400	100.0
\$500,000 and over	8	207	12,443,000	65.7	9	208	15,290,300	69.6
\$300,000 - \$499,999 ...	9	61	3,206,100	16.9	11	73	4,453,200	20.2
\$200,000 - \$299,999 ...	7	42	1,625,400	8.6	5	29	1,151,300	5.2
Less than \$200,000	11	53	1,670,000	8.8	7	31	1,102,600	5.0

Annual sales	1 9 4 4				1 9 4 5			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	29	323	\$ 23,004,500	100.0	27	309	\$ 24,126,300	100.0
\$500,000 and over	13	234	18,587,600	80.8	13	232	19,796,500	82.0
\$300,000 - \$499,999 ...	7	45	2,734,700	11.9	8	50	3,201,600	13.3
\$200,000 - \$299,999 ...	5	24	1,086,600	4.7	3	13	670,500	2.8
Less than \$200,000	4	20	595,600	2.6	3	14	457,700	1.9

Table 6. Drug Chains Classified According to Type of Operation, 1941-1945

	1 9 4 1					1 9 4 3				
	Number of chains	Number of stores	Total sales		Per cent of total	Number of chains	Number of stores	Total sales		Per cent of total
			Amount	Per cent of total				Amount	Per cent of total	
Drug chains, Total	35	363	\$ 18,944,500	100.0		32	341	\$ 21,997,400	100.0	
Local chains	25	157	7,053,300	37.2		24	149	8,419,200	38.3	
Provincial and national chains	10	206	11,891,200	62.8		8	192	13,578,200	61.7	

	1 9 4 4					1 9 4 5				
	Number of chains	Number of stores	Total Sales		Per cent of total	Number of chains	Number of stores	Total sales		Per cent of total
			Amount	Per cent of total				Amount	Per cent of total	
Drug chains, Total	29	323	\$ 23,004,500	100.0		27	309	\$ 24,126,300	100.0	
Local chains	21	133	8,304,900	36.1		19	117	8,363,200	34.7	
Provincial and national chains	8	190	14,699,600	63.9		8	192	15,763,100	65.3	

Table 7. Drug Chains - Chain Units Classified According to Amount of Annual Sales, 1941-1945

Annual sales	1 9 4 1				1 9 4 3			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
CANADA, Total	363	\$ 18,944,500	100.0	-	341	\$ 21,997,400	100.0	-
\$200,000 and over	2)	3,543,600	18.6	18.6	2)	6,369,000	29.0	29.0
\$100,000 - \$199,999	25)	8,439,900	44.6	63.2	43)	10,540,400	47.9	76.9
\$50,000 - \$99,999	126	5,241,900	27.7	90.9	152	4,044,500	18.4	95.3
\$30,000 - \$49,999	131	1,355,400	7.2	98.1	99	925,300	4.2	99.5
\$20,000 - \$29,999	54	346,400	1.8	99.9	36	97,400	0.4	99.9
\$10,000 - \$19,999	21	6,200	(1)	-	6	20,800	0.1	100.0
\$5,000 - \$9,999	1	11,100	0.1	100.0	3	-	-	-
Less than \$5,000	3	-	-	-	-	-	-	-

Annual sales	1 9 4 4				1 9 4 5			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
CANADA, Total	323	\$ 23,004,500	100.0	-	309	\$ 24,126,500	100.0	-
\$200,000 and over	2)	8,203,700	35.7	35.7	5	1,308,400	5.4	5.4
\$100,000 - \$199,999	55)	10,959,500	47.6	83.3	62	8,504,500	35.3	40.7
\$50,000 - \$99,999	156	3,045,200	13.2	96.5	160	11,391,700	47.2	87.9
\$30,000 - \$49,999	75	636,800	2.8	99.3	62	2,499,500	10.4	98.3
\$20,000 - \$29,999	24	146,000	0.6	99.9	14	358,800	1.5	99.8
\$10,000 - \$19,999	9	8,000	0.1	100.0	2	33,600	0.1	99.9
\$5,000 - \$9,999	1	3,300	(1)	100.0	3)	29,900	0.1	100.0
Less than \$5,000	1	-	-	-	1)	-	-	-

(1) Less than .05 per cent.

LIST OF DRUG CHAINS IN CANADA, 1945

American Drug Stores, The	1187 St. Catherine St. W.,	Montreal, Que.
Barne's Drug Company	3 Queen Street East	Sault Ste. Marie, Ont.
Buckley's Ltd.,	161 Spring Garden Rd.,	Halifax, N.S.
Cairncross and Lawrence, Ltd.	216 Dundas St.,	London, Ont.
Cunningham Drug Stores, Ltd.	456 Broadway St., W.,	Vancouver, B.C.
Gray's Super Value Drug Stores, Reg'd.	417 St. James St., W.,	Montreal, Que.
Lanspeary's, Ltd.	1394 Ouellette Ave.,	Windsor, Ont.
Leduc Drug Co., Dr.	630 Dorchester St.,	Montreal, Que.
Liggett Co., Ltd., Louis K.	579 Richmond St. W.,	Toronto, Ont.
MacLeod-Balcom, Ltd.	55 Argyle St.,	Halifax, N.S.
Macy's Drug Stores, Reg'd.	1411 Stanley St.,	Montreal, Que.
Merrick Drug Stores, Ltd.,	9627-105A Ave.,	Edmonton, Alta.
Owl Drug Co., Ltd.	193 East Hastings,	Vancouver, B.C.
Owl Drug Stores, Ltd.	251 Carleton St.,	Toronto, Ont.
Patterson's Drug Stores, Ltd.	3206 Sandwich St. W.,	Windsor, Ont.
Pharmacie Martineau	857 rue St-Maurice,	Montreal, Que.
Pharmacies Melrose	5639 Verdun Ave.,	Verdun, Que.
Pond's Drug Stores, Ltd.	301 Ouellette Ave.,	Windsor, Ont.
Reliable Drug Store	1850 Commercial Drive,	Vancouver, B.C.
Ringers Drug Stores	432 Main St.,	Winnipeg, Man.
Robert's Drug Stores, Ltd.	645 Logan Ave.,	Winnipeg, Man.
Ross Drug Co., Ltd., & Ross Drug United, Ltd.	66 King St.,	Woodstock, N.B.
Rutherford's Drug Stores, Ltd.	248 Bay St.,	Toronto, Ont.
Sloane Drug Stores, Ltd.	431 Tegler Building,	Edmonton, Alta.
Standard Drug, Ltd., The	105 Stanley St.,	London, Ont.
Tamblyn, Ltd., G.	225 Jarvis St.,	Toronto, Ont.
Walker Drug Co., Ltd.	1879 Ferry St.,	Niagara Falls, Ont.

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Minister of Trade and Commerce

DOMINION BUREAU OF STATISTICS

MERCHANDISING AND SERVICES STATISTICS

OTTAWA, CANADA

DRUG STORE CHAINS

IN

CANADA

1946



OTTAWA

December 1947

Price 25 cents

Retail Drug Store Chains

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DEFINITIONS

Chains

For the purpose of this survey, a retail chain is an organization operating four or more retail stores under the same ownership.

Kind of business classification

A chain is classified according to the kind of business carried on by the majority of its stores. Drug chains included in this report are those operating regular drug stores or drug stores with soda fountain. In a few instances drug chains operated other than straight drug stores.

Stores Average

The average number of stores operated is obtained by averaging the number in operation at January 1st, June 30 and December 31st.

Maximum

The maximum number is the total number of stores operated throughout the year, whether continuous or part year.

Sales

Net retail sales are gross sales less any returns or allowances. Sales at wholesale are not included.

Salaries and Wages

Salaries and wages shown in this report are those paid to store employees only as comparable to store sales. Salaries and wages paid to head office and warehouse employees are not included.

Accounts Outstanding

This represents the amounts owing on charge, instalment or open accounts at the end of the year. It does not include any accounts written off.

Stocks

The inventory of stocks on hand at the end of the year in both stores and warehouses is at cost or invoice value.

Type of Organization Classification

Local chains are those operating 4 or more stores within one city or locality.

Provincial and national chains, as the names imply, are those whose operations are respectively provincial and national in scope. Sectional chains are those operating stores in more than one province, such as in the Maritimes, but not on the broader national scope.

DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES STATISTICS

OTTAWA

Dominion Statistician, HERBERT MARSHALL
Director, Division of Census of Industry and Merchandising, W.H. Iosee
Chief, Merchandising and Services Statistics, C.H. McDonald

Series, 1946

16-1070

No. 8

DRUG STORE CHAINS, 1946

Introduction

The Dominion Bureau of Statistics conducts an annual survey on the operation of retail chains of which drug store chains form a part. Information is obtained and results tabulated on net retail sales, salaries and wages paid to store employees, accounts outstanding at the end of the year and store and warehouse inventories at the end of the year. Reports are received from all known firms coming within the definition of a chain giving this study a complete coverage. Although retail drug store chains are included in the comprehensive report "Retail Chains in Canada, 1946" which will be made available shortly, information on these stores is presented here in considerably more detail. Of the 318 stores tabulated, 117 operated soda fountains in connection with their regular drug store business, the figures for which are included in this report.

Summary

1. Stores and Sales in 1946

In 1946 there were 27 retail drug chains in Canada, operating 318 stores, sales of which amounted to \$26,483,700. With an increase of 9 in the number of stores, the dollar volume of net sales at retail increased 9.8 per cent from 1945.

2. Comparison with Previous Years

Table 1 depicts the growth of chain stores in the retail drug field since 1930, the first year in which the survey was conducted. Comparison in the trends of average store sales, salaries and stocks is shown in chart 1. Salaries and sales have increased quite consistently since the low of 1933. Outstanding accounts declined rapidly through the war years but have increased again to a marked degree in 1946. Stocks in both stores and warehouses increased in dollar volume to a considerable extent by the end of 1946.

3. Provincial Comparison

Increases in the volume of sales were general in all regions

of the country, ranging from a gain over 1945 of 13.6 per cent in the Prairie provinces to one of 5.2 per cent in the Maritimes. The number of firms in each region remained constant and the number of stores made only slight gains.

4. Drug Chains Classed by Number of Units

Two firms moved upward from the smallest unit number class and one firm downward from the largest class to help increase the volume of business done by the middle group, 6 to 9 units. (See table 3).

5. Chains Classed by Amount of Annual Sales

The only change which occurred in the distribution of sales by size of firm was the upward movement of one chain from the \$300,000-\$499,999 class to that of \$500,000 and over. (See table 4).

6. Individual Units Classified by Size of Business

The continued gains in average sales per store resulted in a general shifting of stores to the larger size ranges. Since 1941 stores with annual sales of \$50,000 and over have increased their proportion of the total sales of retail chain drug stores from 63.2 per cent to 89.2 per cent. (See table 5).

7. Chains Classed by Type

No significant change took place in 1946 in the relationship between local chains and provincial, sectional and national chains. Local chains accounted for 34.6 per cent of the business and the other group for 65.4 per cent. (See table 6).

RETAIL DRUG STORE CHAINS
AVERAGE SALES, SALARIES, STOCKS
AND ACCOUNTS OUTSTANDING
PER STORE

1930-1946

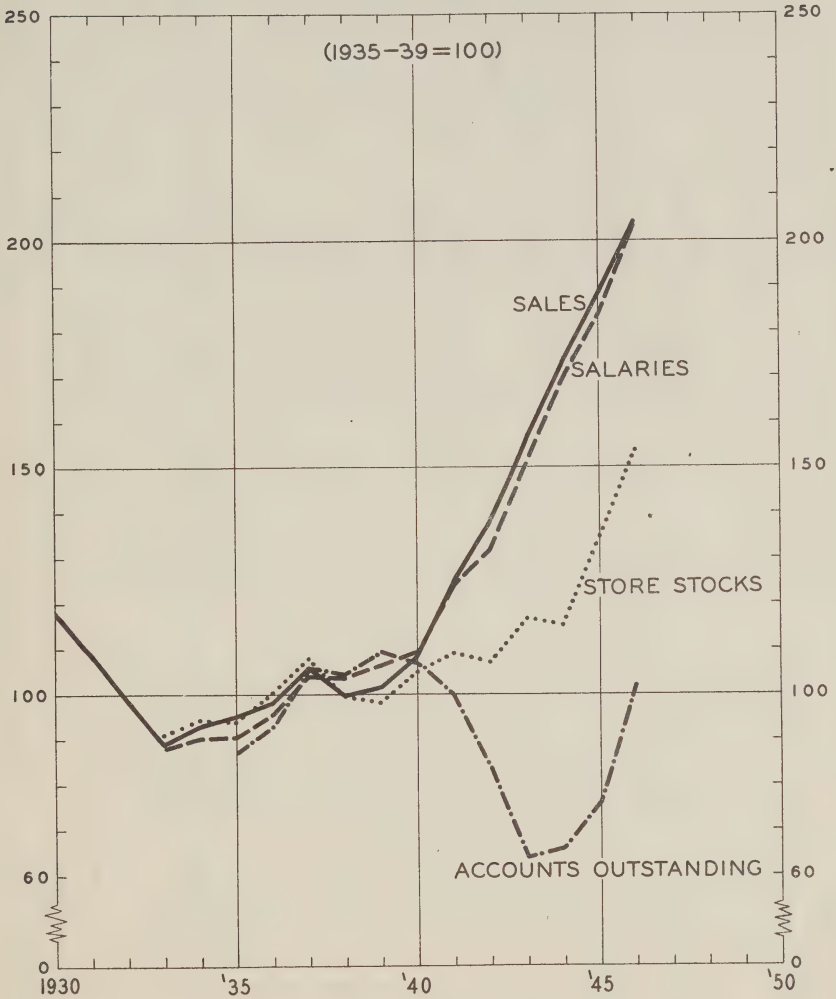


Table 1.--Summary of Drug Store Chains, 1930-1946

Year	Number of chains	Stores		Retail sales	Average sales per store	Salaries and wages paid to store employees	Accounts out-standing	Stock on hand end of year	
		Average age (1)	Maximum					Stores	Warehouses
1930 ..	31	284	292	13,971,300	49,195	1,880,800	(a)	2,510,900	(a)
1931 ..	32	299	306	13,584,600	45,433	(a)	(a)	(a)	(a)
1932 ..	32	305	313	12,520,000	41,049	(a)	(a)	(a)	(a)
1933 ..	29	297	301	11,001,300	37,041	1,497,700	(a)	2,021,500	(a)
1934 ..	29	298	306	11,594,000	38,906	1,542,800	(a)	2,102,000	527,000
1935 ..	29	307	311	12,164,100	39,622	1,594,800	118,700	2,152,500	501,100
1936 ..	30	314	320	12,871,600	40,992	1,719,500	129,700	2,357,700	529,300
1937 ..	31	320	332	14,163,300	44,460	1,909,100	150,800	2,582,300	551,900
1938 ..	33	340	347	14,127,100	41,550	2,019,100	157,900	2,525,600	687,500
1939 ..	31	336	345	14,251,800	42,416	2,048,900	183,000	2,461,900	613,800
1940 ..	32	345	354	15,613,000	45,255	2,154,100	183,900	2,705,300	654,400
1941 ..	31	361	363	18,944,500	52,478	2,567,800	159,800	2,936,100	792,000
1942 ..	31	342	345	19,711,700	57,637	2,579,700	(a)	2,732,900	699,400
1943 ..	31	330	334	21,511,600	65,187	2,849,900	93,300	2,873,800	734,100
1944 ..	29	319	323	23,004,500	72,114	3,096,100	93,600	2,743,000	733,700
1945 ..	27	306	309	24,126,500	78,845	3,225,900	103,000	3,083,100	673,400
1946 ..	27	310	318	26,423,700	85,431	3,620,300	140,800	3,553,200	751,800

(1) Obtained by averaging the number at the beginning, middle and end of year.

(a) Not available.

Table 2.--Drug Chains, Maximum Number of Stores and Sales by Provinces,
1930, 1941 and 1944-1946

	1930	1941	1944	1945	1946	Per cent change in sales 1945-1946
CANADA TOTAL						
Chains Stores Sales	31 292 \$13,971,500	35 363 \$18,944,500	29 323 \$23,004,500	27 309 \$24,126,300	27 318 \$26,453,700	+ 9.8
British Columbia						
Chains Stores Sales	4 41 \$2,042,500	3 49 \$2,575,900	3 48 \$4,083,000	3 48 \$4,500,300	3 51 \$4,959,700	+10.2
Prairie Provinces						
Chains Stores Sales	7 37 \$1,778,600	6 37 \$1,827,900	5 32 \$2,347,500	5 32 \$2,560,500	5 33 \$2,909,200	+13.6
Ontario						
Chains Stores Sales	11 137 \$6,969,200	17 198 \$10,332,400	13 172 \$11,555,900	11 163 \$11,837,300	11 167 \$13,075,100	+10.5
Quebec						
Chains Stores Sales	7 54 \$2,367,900	8 55 \$3,106,100	7 47 \$3,631,500	7 42 \$3,794,600	7 43 \$4,031,200	+ 6.2
Maritime Provinces						
Chains Stores Sales	4 23 \$793,100	3 24 \$1,102,200	3 24 \$1,416,900	3 24 \$1,433,600	3 24 \$1,508,500	+ 5.2

Table 3.--Drug Chains Classified According to Number of Stores Operated, 1941, 1944, 1945

Number of units	1941				1944			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	23	363	\$18,944,500	100.0	29	323	\$23,004,500	100.0
Less than 6 units	14	58	3,282,900	17.3	11	48	3,610,100	15.7
6 - 9 units	13	90	3,669,400	19.4	10	67	4,228,900	18.4
10 units and over	8	215	11,992,200	63.3	8	208	15,165,500	65.9

Number of units	1945				1946			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	27	309	\$24,126,300	100.0	27	316	\$26,483,700	100.0
Less than 6 units	10	44	3,711,800	15.4	8	34	3,295,800	12.4
6 - 9 units	9	59	4,340,400	18.0	12	81	6,025,700	22.8
10 units and over	8	206	16,074,100	66.6	7	203	17,162,200	64.8

Table 4.--Drug Chains Classified According to Amount of Annual Sales, 1941, 1944-1946

Annual sales	1941					1944		
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	35	363	\$18,944,500	100.0	29	323	\$23,004,500	100.0
\$500,000 and over	8	207	12,443,000	65.7	13	234	18,587,600	80.8
\$300,000 - \$499,999 ...	9	61	3,206,100	16.9	7	45	2,734,700	11.9
\$200,000 - \$299,999 ...	7	42	1,625,400	8.6	5	24	1,086,600	4.7
Less than \$200,000	11	53	1,670,000	8.8	4	20	595,600	2.6

Annual sales	1945					1946		
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	27	309	\$24,126,300	100.0	27	318	\$26,483,700	100.0
\$500,000 and over	13	232	19,796,500	82.0	14	244	22,324,800	84.3
\$300,000 - \$499,999 ...	8	50	3,201,600	13.3	7	46	2,865,300	10.8
\$200,000 - \$299,999 ...	3	13	670,500	2.8	3	14	790,600	3.0
Less than \$200,000	3	14	457,700	1.9	3	14	503,000	1.9

Table 5.--Drug Chains - Chain Units Classified According to Amount of Annual Sales, 1941, 1944-1946

1941

1944

Annual sales

CANADA, Total

\$200,000 and over

\$100,000 - \$199,999

\$50,000 - \$99,999

\$30,000 - \$49,999

\$20,000 - \$29,999

Less than \$20,000

Number

Sales

Per cent of total

Cumulative per cent

363

18,944,500

100.0

-

2)

3,543,600

18.6

18.6

25)

8,439,900

44.6

63.2

126

5,241,900

27.7

90.9

131

1,355,400

7.2

98.1

54

363,700

1.9

100.0

25

Number

Sales

Per cent of total

Cumulative per cent

323

23,004,500

100.0

-

2)

8,203,700

35.7

35.7

55)

10,959,500

47.6

83.3

156

3,045,200

13.2

96.5

75

638,800

2.8

99.3

24

157,300

0.7

100.0

11

Number

Sales

Per cent of total

Cumulative per cent

318

26,483,700

100.0

-

9

2,330,200

8.8

8.8

78

10,198,400

38.5

47.3

155

11,097,600

41.9

89.2

64

2,600,500

9.8

99.0

9

222,300

0.9

99.9

3

34,700

0.1

100.0

1945

1946

Annual sales

CANADA, Total

\$200,000 and over

\$100,000 - \$199,999

\$50,000 - \$99,999

\$30,000 - \$49,999

\$20,000 - \$29,999

Less than \$20,000

Number

Sales

Per cent of total

Cumulative per cent

309

24,126,300

100.0

-

5

1,308,400

5.4

5.4

62

8,504,500

35.3

40.7

160

11,391,700

47.2

87.9

62

2,499,500

10.4

98.3

14

358,800

1.5

99.8

6

63,400

0.2

100.0

309

24,126,300

100.0

-

318

26,483,700

100.0

-

9

2,330,200

8.8

8.8

78

10,198,400

38.5

47.3

155

11,097,600

41.9

89.2

64

2,600,500

9.8

99.0

9

222,300

0.9

99.9

3

34,700

0.1

100.0

Table 6.--Drug Chains Classified According to Type of Operation, 1941, 1944-1946

	1941					1944		
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	35	363	\$ 18,944,500	100.0	29	323	\$ 23,004,500	100.0
Local chains	25	157	7,053,300	37.2	21	133	8,304,900	36.1
Provincial, sectional and national chains	10	206	11,891,200	62.8	8	190	14,699,600	63.9

11

	1945					1946		
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	27	309	\$ 24,126,300	100.0	27	318	\$ 26,483,700	100.0
Local chains	19	117	8,363,200	34.7	19	119	9,162,400	34.6
Provincial, sectional and national chains	8	192	15,763,100	65.3	8	199	17,321,300	65.4

LIST OF DRUG STORE CHAINS IN CANADA, 1946

American Drug Stores, The	1187 St. Catherine St. W.,	Montreal, Que.
Barne's Drug Company	3 Queen Street East	Sault Ste.Marie, Ont.
Buckley's Ltd.	161 Spring Garden Rd.,	Halifax, N.S.
Cairncross and Lawrence, Ltd.	216 Dundas St.,	London, Ont.
Cunningham Drug Stores, Ltd.	456 Broadway St., W.,	Vancouver, B.C.
Gray's Super Value Drug Stores, Reg'd.	417 St. James St., W.,	Montreal, Que.
Lanspeary's, Ltd.	1394 Ouellette Ave.,	Windsor, Ont.
Leduc Drug Co., Dr.	630 Dorchester St.,	Montreal, Que.
Liggett Co., Ltd., Louis K.	579 Richmond St. W.,	Toronto, Ont.
MacLeod-Balcom, Ltd.	55 Argyle St.,	Halifax, N.S.
Macy's Drug Stores, Reg'd.	1411 Stanley St.,	Montreal, Que.
Merrick Drug Stores, Ltd.	9627-105A Ave.,	Edmonton, Alta.
Owl Drug Co., Ltd.	1168 Hamilton St.,	Vancouver, B.C.
Owl Drug Stores, Ltd.	251 Carleton St.,	Toronto, Ont.
Patterson's Drug Stores, Ltd.	3206 Sandwich St. W.,	Windsor, Ont.
Pharmacies Martineau	857 rue St-Maurice,	Montreal, Que.
Pharmacies Melrose	5639 Verdun Ave.,	Verdun, Que.
Pond's Drug Stores, Ltd.	301 Ouellette Ave.,	Windsor, Ont.
Reliable Drug Stores	1850 Commercial Drive,	Vancouver, B.C.
Ringers Drug Stores	432 Main St.,	Winnipeg, Man.
Robert's Drug Stores, Ltd.	645 Logan Ave.,	Winnipeg, Man.
Ross Drug Co., Ltd., & Ross Drug United, Ltd.	66 King St.,	Woodstock, N.B.
Rutherford's Drug Stores, Ltd.	248 Bay St.,	Toronto, Ont.
Sloane Drug Stores, Ltd.	431 Tegler Building,	Edmonton, Alta.
Standard Drug, Ltd., The	105 Stanley St.,	London, Ont.
Tamblyn, Ltd., G.	225 Jarvis St.,	Toronto, Ont.
Walker Drug Co., Ltd.	1879 Ferry St.,	Niagara Falls, Ont.

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MERCHANDISING AND SERVICES STATISTICS

OTTAWA, CANADA

**DEPT. OF
POLITICAL ECONOMY**

DRUG STORE CHAINS

1947



Price 25 cents

October 1948

Retail Drug Store Chains

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DEFINITIONS

Chains

For the purpose of this survey, a retail chain is an organization operating four or more retail stores under the same ownership.

Kind of business classification

A chain is classified according to the kind of business carried on by the majority of its stores. Drug chains included in this report are those operating regular drug stores or drug stores with soda fountain. In a few instances drug chains operated other than straight drug stores.

Stores Average

The average number of stores operated is obtained by averaging the number in operation at January 1st, June 30 and December 31st.

Maximum

The maximum number is the total number of stores operated throughout the year, whether continuous or part year.

Sales

Net retail sales are gross sales less any returns or allowances. Sales at wholesale are not included.

Salaries and Wages

Salaries and wages shown in this report are those paid to store employees only as comparable to store sales. Salaries and wages paid to head office and warehouse employees are not included.

Accounts Outstanding

This represents the amounts owing on charge, instalment or open accounts at the end of the year. It does not include any accounts written off.

Stocks

The inventory of stocks on hand at the end of the year in both stores and warehouses is at cost or invoice value.

Type of Organization Classification

Local chains are those operating 4 or more stores within one city or locality.

Provincial and national chains, as the names imply, are those whose operations are respectively provincial and national in scope. Sectional chains are those operating stores in more than one province, such as in the Maritimes, but not on the broader national scope.

DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES STATISTICS

OTTAWA

Dominion Statistician, HERBERT MARSHALL
Director, Division of Census of Industry and Merchandising, W.H. Losee
Chief, Merchandising and Services Statistics, C.H. McDonald

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DRUG STORE CHAINS, 1947

In 1947, twenty-six drug store chains transacted retail business to the extent of \$26,868,800 through 314 stores. This represented an increase in dollar volume from 1946 of 1.5 per cent.

Salaries paid to store employees increased moderately to \$3,667,900 in 1947 and outstanding accounts rose 9.1 per cent. A noticeable increase of 28.5 per cent in warehouse stocks represented the greatest gain of the items in this bulletin. Store stocks increased moderately from \$3,553,200 in 1946 to \$3,716,400 at the end of 1947. (Table 1).

British Columbia and Ontario showed sales increases over the previous year but the other regions of the country reported lower sales than in 1946. The Prairie Provinces decrease of 13.4 per cent was the greatest change. (Table 2).

The expansion of the larger chains is evidenced in table 3 where the firms with annual sales over \$500,000 have increased their share of total chain drug store sales to 86.6 per cent from 65.7 per cent in 1941. The sales of local chains were reduced to 31.8 per cent of the total in 1947 while the chain firms of larger scope in geographic distribution of stores transacted 68.2 per cent of the business compared to 65.4 per cent in 1946.

RETAIL DRUG STORE CHAINS AVERAGE SALES, SALARIES, STOCKS AND ACCOUNTS OUTSTANDING PER STORE

1930 - 1947

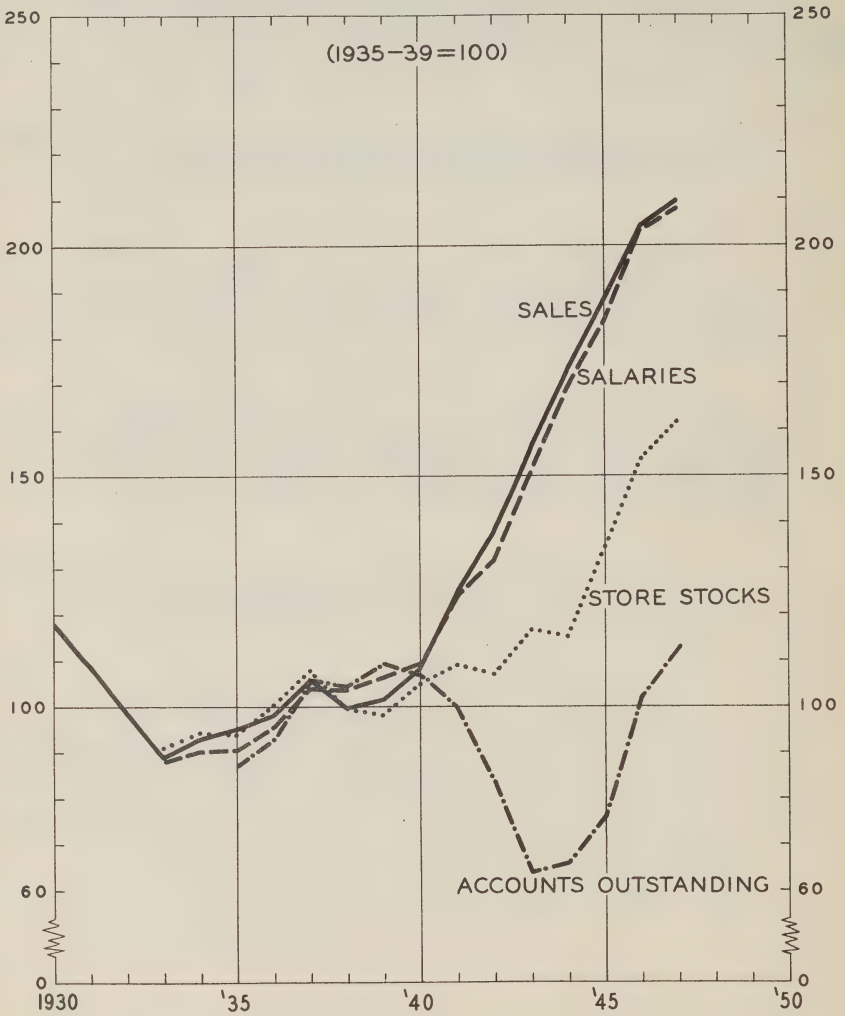


Table 1.--Summary of Drug Store Chains, 1930-1947

Year	Number of chains	Stores		Retail sales	Average sales per store	Salaries and wages paid to store employees	Accounts out-standing	Stock on hand end of year	
		Average (1)	Maximum					Stores	Warehouses
1930 ..	31	284	292	13,971,300	49,195	1,880,800	(a)	2,510,900	(a)
1931 ..	32	299	306	13,864,600	45,433	(a)	(a)	(a)	(a)
1932 ..	32	305	313	12,520,000	41,049	(a)	(a)	(a)	(a)
1933 ..	29	297	301	11,001,300	37,041	1,497,700	(a)	2,021,500	(a)
1934 ..	29	298	306	11,594,000	38,906	1,542,800	(a)	2,102,000	527,000
1935 ..	29	307	311	12,164,100	39,622	1,594,800	118,700	2,152,500	501,100
1936 ..	30	314	320	12,871,600	40,992	1,719,500	129,700	2,357,700	529,300
1937 ..	31	320	332	14,163,300	44,260	1,909,100	150,800	2,582,300	551,900
1938 ..	33	340	347	14,127,100	41,550	2,019,100	157,900	2,525,600	687,500
1939 ..	31	336	345	14,251,800	42,416	2,048,900	163,000	2,461,900	613,800
1940 ..	32	345	354	15,613,000	45,255	2,154,100	163,900	2,708,300	654,400
1941 ..	31	361	363	18,944,500	52,478	2,567,800	159,800	2,936,100	792,000
1942 ..	31	342	343	19,711,700	57,637	2,579,700	(a)	2,732,900	699,400
1943 ..	31	330	334	21,511,600	65,187	2,849,900	93,300	2,873,800	734,100
1944 ..	29	319	323	23,004,500	72,114	3,096,100	93,600	2,743,000	733,700
1945 ..	27	306	309	24,126,500	78,845	3,225,900	103,000	3,083,100	673,400
1946 ..	27	310	318	26,483,700	85,431	3,620,300	140,800	3,553,200	751,800
1947 ..	26	307	314	26,868,800	87,520	3,667,900	153,600	3,716,400	966,100

(1) Obtained by averaging the number at the beginning, middle and end of year.

(a) Not available.

Table 2.--Drug Chains, Maximum Number of Stores and Sales by Provinces, 1930, 1941 and 1945-1947

	1930	1941	1945	1946	1947	Per cent change in sales 1946-1947
CANADA TOTAL	Chains Stores Sales 31 292 \$13,971,300	35 363 \$18,944,500	27 309 \$24,126,300	27 318 \$26,483,700	26 314 \$26,868,800	+ 1.5
British Columbia	Chains Stores Sales 4 41 \$ 2,042,500	3 49 \$ 2,575,900	3 48 \$ 4,500,300	3 51 \$ 4,959,700	3 52 \$ 5,302,500	+ 6.9
Prairie Provinces	Chains Stores Sales 7 37 \$ 1,778,600	6 37 \$ 1,827,900	5 32 \$ 2,560,500	5 33 \$ 2,909,200	7 34 \$ 2,519,500	-13.4
Ontario	Chains Stores Sales 11 137 \$ 6,989,200	17 198 \$10,332,400	11 163 \$11,637,300	11 167 \$13,075,100	10 163 \$13,641,800	+ 4.3
Quebec	Chains Stores Sales 7 54 \$ 2,367,900	8 55 \$ 3,106,100	7 42 \$ 3,794,600	7 43 \$ 4,031,200	7 42 \$ 3,942,700	- 2.2
Maritime Provinces	Chains Stores Sales 4 23 \$ 793,100	3 24 \$ 1,102,200	3 24 \$ 1,433,600	3 24 \$ 1,508,500	4 23 \$ 1,462,300	- 3.1

Table 3.--Drug Chains Classified According to Amount of Annual Sales, 1941, 1945-1947

Annual sales	1941				1945			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	35	363	\$18,944,500	100.0	27	309	\$24,126,300	100.0
\$500,000 and over	8	207	12,443,000	65.7	13	232	19,796,500	82.0
\$300,000 - \$499,999 ...	9	61	3,206,100	16.9	8	50	3,201,600	13.3
\$200,000 - \$299,999 ...	7	42	1,625,400	8.6	3	13	670,500	2.8
Less than \$200,000	11	53	1,670,000	8.8	3	14	457,700	1.9

Annual sales	1946				1947			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
Drug chains, Total	27	318	\$26,483,700	100.0	26	314	\$26,869,800	100.0
\$500,000 and over	14	244	22,324,800	84.3	14	248	23,274,800	86.6
\$300,000 - \$499,999 ...	7	46	2,865,300	10.8	5	33	1,870,800	7.0
\$200,000 - \$299,999 ...	3	14	790,600	3.0	5	24	1,723,200	6.4
Less than \$200,000	3	14	503,000	1.9	2	9		

Table 4.--Drug Chains - Chain Units Classified According to Amount of Annual Sales, 1941, 1945-1947

Annual sales	1941			Cumulative per cent	1945			Cumulative per cent
	Number	Sales \$	Per cent of total		Number	Sales \$	Per cent of total	
CANADA, Total	363	18,944,500	100.0	-	309	24,126,300	100.0	-
\$200,000 and over	21	3,543,600	18.6	18.6	5	1,308,400	5.4	5.4
\$100,000 - \$199,999	251	8,439,900	44.6	63.2	62	8,504,500	35.3	40.7
\$50,000 - \$99,999	126	5,241,900	27.7	90.9	160	11,391,700	47.2	87.9
\$30,000 - \$49,999	131	1,355,400	7.2	98.1	62	2,499,500	10.4	98.3
\$20,000 - \$29,999	54	363,700	1.9	100.0	14	358,800	1.5	99.8
Less than \$20,000	25				6	63,400	0.2	100.0

Annual sales	1946			Cumulative per cent	1947			Cumulative per cent
	Number	Sales \$	Per cent of total		Number	Sales \$	Per cent of total	
CANADA, Total	318	26,483,700	100.0		314	26,868,800	100.0	-
\$200,000 and over	9	2,330,200	8.8	8.8	9	2,361,700	8.8	8.8
\$100,000 - \$199,999	78	10,198,400	38.5	47.3	73	9,800,900	36.5	45.3
\$50,000 - \$99,999	155	11,097,600	41.9	89.2	171	12,439,200	46.3	91.6
\$30,000 - \$49,999	64	2,600,500	9.8	99.0	52	2,101,100	7.8	99.4
\$20,000 - \$29,999	9	222,300	0.9	99.9	5	117,200	0.4	99.8
Less than \$20,000	3	34,700	0.1	100.0	4	48,700	0.2	100.0

Table 5. --Drug Chains Classified According to Type of Operation, 1941, 1945-1947

	1 9 4 5				
	Number of chains	Number of stores	Total sales		Total sales Amount
			Amount	Per cent of total	
Drug chains, Total	35	363	\$ 18,944,500	100.0	\$ 24,126,300 100.0
Local chains	25	157	7,053,300	37.2	8,363,200 34.7
Provincial, sectional and national chains	10	206	11,891,200	62.8	15,763,100 65.3

1
9
1

	1 9 4 6				
	Number of chains	Number of stores	Total sales		Total sales Amount
			Amount	Per cent of total	
Drug chains, Total	27	318	\$ 26,483,700	100.0	\$ 26,868,800 100.0
Local chains	19	119	9,162,400	34.6	8,549,700 31.8
Provincial, sectional and national chains	8	199	17,321,300	65.4	18,319,100 68.2

LIST OF DRUG STORE CHAINS IN CANADA, 1947

American Drug Stores, The	1187 St. Catherine St. W.,	Montreal, Que.
Balcom-Chittick Ltd.,	55 Argyle St.,	Halifax, N.S.
Buckley's Ltd.	161 Spring Garden Rd.,	Halifax, N.S.
Cairncross and Lawrence, Ltd.	216 Dundas St.,	London, Ont.
Corner Drug Stores	10028 - 102nd St.,	Edmonton, Alta
Cunningham Drug Stores Ltd.	456 Broadway St., W.,	Vancouver, B.C.
Garceau, Raoul	474 Lindsay St.,	Drummondville, Que.
Lanspeary's, Ltd.	1394 Ouellette Ave.,	Windsor, Ont.
Leduc Drug Co., Dr.	630 Dorchester St.,	Montreal, Que.
Liggett Co., Ltd., Louis K.	579 Richmond St. W.,	Toronto, Ont.
Macy's Drug Stores, Reg'd.	1411 Stanley St.,	Montreal, Que.
Merrick Drug Stores, Ltd.	9627 - 105A Ave.,	Edmonton, Alta
Owl Drug Co., Ltd.	1168 Hamilton St.,	Vancouver, B.C.
Owl Drug Stores, Ltd.	251 Carleton St.,	Toronto, Ont.
Patterson's Drug Stores, Ltd.	3206 Sandwich St. W.,	Windsor, Ont.
Pharmacies Martineau	857 rue St-Maurice,	Montreal, Que.
Pharmacies Melrose	5639 Verdun Ave.,	Verdun, Que.
Pond's Drug Stores, Ltd.	301 Ouellette Ave.,	Windsor, Ont.
Reliable Drug Stores	1850 Commercial Drive,	Vancouver, B.C.
Robert's Drug Stores, Ltd.	645 Logan Ave.,	Winnipeg, Man.
Ross Drug Co., Ltd., & Ross Drug United, Ltd.	66 King St.,	Woodstock, N.B.
Rutherford's Drug Stores, Ltd.	248 Bay St.,	Toronto, Ont.
Sloane Drug Stores, Ltd.	431 Tegler Building,	Edmonton, Alta
Standard Drug, Ltd., The	105 Stanley St.,	London, Ont.
Tamblyn, Ltd., G.	225 Jarvis St.,	Toronto, Ont.
Walker Drug Co., Ltd.	1879 Ferry St.,	Niagara Falls, Ont.

